SDIMS – Home Community-Based Care

User manual

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Home Community-Based Care User manual

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Abbreviations

SITA	State Information Technology Agency
NDoSD	National Department of Social development
SDIMS	Social Development Information Management System
PERSAL	Personnel Salaries
IP	Internet Protocol
ID	Identity Document
VEP	
WAN	Wide Area Network
SDLC	System Development Life Cycle
SRS	Software Requirements Specification
KPI	Key Performance Indicator
GUI	Graphic User Interface
ERD	Entity Relationship Diagram
CHC	Community Health Centre
CHW	Community Health Worker
DHP	District Health Plans
DHS	District Health System
DMT	District Management Team
DOT/S	Directly Observed Treatment/ Strategy
EPWP	Expanded Public Works Programme
HCBC	Home Community-Based Care
IDP	Integrated Development Plan
IMCI	Integrated Management of Childhood Illnesses
M&E	Monitoring and Evaluation
MLW	Mid-Level worker
NPO	Non-Profit Organisation
NQF	National Qualification Framework
PHC	Primary Health Care
RPL	Recognition of Prior Learning
SAQA	South African Qualifications Authority
SLA	Service Level Agreement
VCT	Voluntary Counselling and Testing
WHO	World Health Organization

Preface

Scope of this preface

- ✓ Prerequisites for attending a Home Community-Bases Care module
- ✓ How Home Community-Bases Care training manual is organised.
- ✓ Related publications

Welcome to the **HOME COMMUNITY-BASED CARE** training. In this preface you will find the prerequisites for attending a **HOME COMMUNITY-BASED CARE** module, information on the layout of this training manual as well as publications that relates to the content presented in this training manual.

1. Prerequisites for this module

a) Before you begin this module, you should comply with the prerequisites as listed below.

b) Must be computer literate or have basic knowledge of using a computer.

c) Be able to identify and interpret relevant policies and procedures related to the Application of an **HOME COMMUNITY-BASED CARE** to registration with the Department of Health and Social Development

d) Read, Speak and write English as medium of instruction throughout the training session.

2. How this training manual is organised

The main objective of this training manual is to enable the SDIMS users to effectively utilise the system regarding all the respective applicable processes within **HOME COMMUNITY-BASED CARE** Module.
The purpose of this document is to outline the specific policies, procedures and operational rules that govern the completion of various tasks on SDIMS, specifically relating to the ***HOME COMMUNITY-BASED CARE.*** The policies and procedures manual describes the user instructions for performing both manual and electronic functions that are required to effectively use, operate and maintain the SDIMS module.

The reason for the compilation of this manual is to give all officials guidance as to the procedure that will be used by Department of Health and Social Development Officials in the capture, storage and retrieval of the **HOME COMMUNITY-BASED CARE** information. Further more it will be used to obtain uniform procedures Nationally.

***Note*:** all examples that might be used in this document and during the course of the training are purely fictional.
The examples are presented without prejudice and are for illustrative purposes only.

The layout of this user manual is indicated in the table below.

Table 1 - Training Manual layout

Chapter	Topic
Chapter 1	Introduction
Chapter 2	Registration Learning unit 1 – Organisation Search Learning unit 2 – HCBC Information Capturing Learning unit 3 – Personnel Registration Learning unit 4 – Reassign
Chapter 3	Organisation Reports Learning unit 1 – Organisation Reports Learning unit 2 – Monthly Stipend Learning unit 3 – Monthly Service Learning unit 4 – Training Learning unit 5 – Procurement Learning unit 6 – Quarterly Reports Learning unit 7 – Annual Reports
Chapter 4	Management Learning unit 1 – Funding Information Learning unit 2 – M&E Meeting Learning unit 3 – Supervisory visit Learning unit 4 – Problem Tracking Learning unit 5 – Sign-Off Reports

3. Related publications

List any applicable documentation under this heading.

Chapter 1: Introduction

Outcomes

- ✓ Summarise the **HOME COMMUNITY-BASED CARE** flow process.
- ✓ Explain security issues on the system.
- ✓ Identify different role players in the **HOME COMMUNITY-BASED CARE** module and explain system access levels assigned to each role player on system.
- ✓ Connect to the internet, Log on to the SDIMS and change a user password.

1. System Description

HOME COMMUNITY-BASED CARE Module allows for the Registration, Management and Maintenance of Home and Community-Based Care that provide a comprehensive and quality health and social service within the home and community in order to promote, restore and maintain a person's maximal level of comfort, social functioning and health.

Many of these facilities share common information and thus the system was created allowing for their uniqueness. If an organisation is already registered in the NPO System, then the organisational details do not need to be entered again into the **HOME COMMUNITY-BASED CARE** Module, in this case some of the organisation details can not be amended. All **HCBC's** are required to register with the department.

1.1 System description

The main function of the ***HCBC Module***: is the registration and management of HCBC organisation

The ***HCBC Module*** functions together with other modules of the SDIMS system. If an organisation is already registered in the NPO Module, it is not necessary to re-enter these details in the HCBC Module. Rather, the organisation needs only to be updated with the missing information.

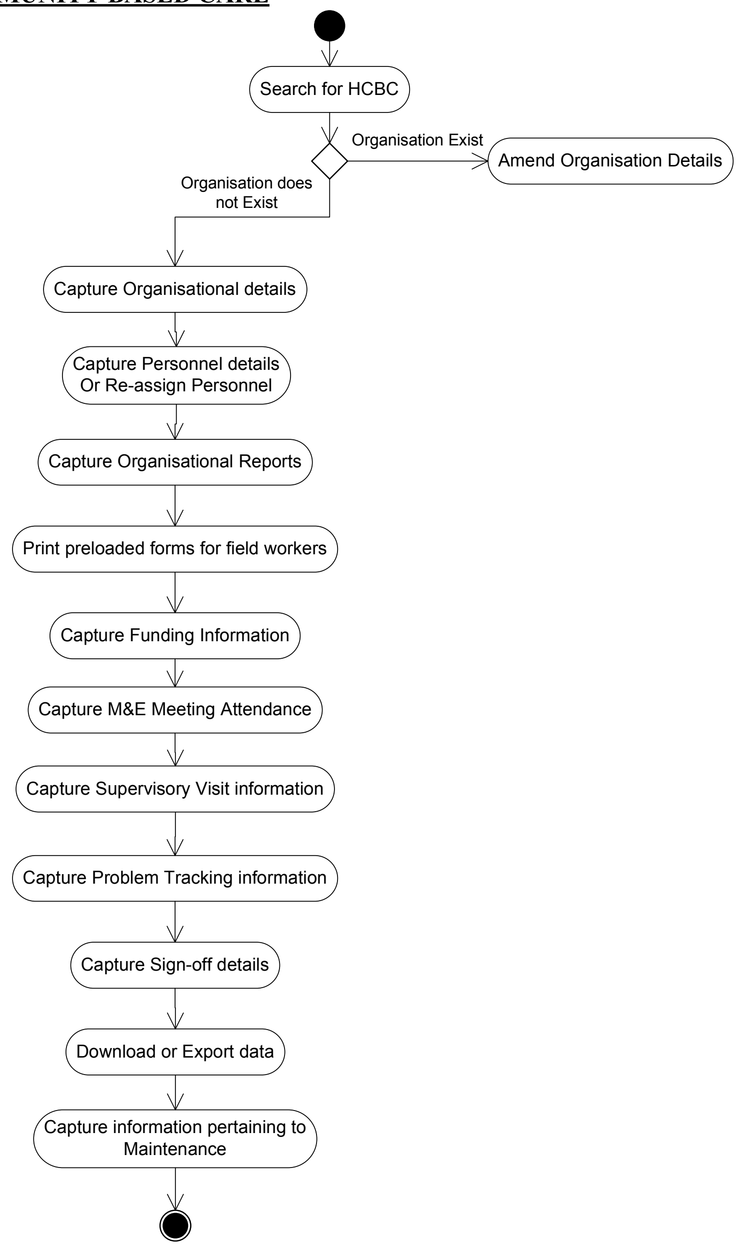
Selective Officials from Department of Social Development and Department of Health will

be responsible for inputting HCBC organisation information and for updating existing Organisation details. This information is entered through the online (web-based) system and stored in a central database. Supervisors and Managers, on the other hand, will monitor the progress of the module by generating reports.

1.2 HCBC Activity Diagram

Figure 1 - Home Community-Based Care Activity Diagram

HOME COMMUNITY BASED CARE



2. System Security

Given the nature of the information that is stored within the ***HOME COMMUNITY-BASED CARE Module***, secure access to information is a priority. Users are assigned various security clearance levels based on their work functions or roles within the department.

The users of the ***HCBC Module*** and their main roles have been identified as follows:

Data Capturer will capture organisation details on the system

Coordinators will capture Sign-off details on the system

Supervisors and Management will monitor performance and effectiveness by accessing online reports on a monthly basis

These user groups correspond to the various security access levels that are available in the ***HOME COMMUNITY-BASED CARE***.

A systems administrator handles the management of user security levels and passwords centrally.

A security access level is assigned by the systems administrator, and is associated with the PERSAL number of a particular employee. PERSAL numbers are unique personnel identification numbers that all salaried employees should hold.

3. Getting started on SDIMS

The system requires users to log on using a unique user name and password combination. This log in process ensures the integrity of the system and the information that is stored within it. User names are the PERSAL numbers, and the systems administrator assigns passwords. Passwords should at all times remain strictly confidential. Users should never give out their passwords to other users or outside individuals. SDIMS handles sensitive and confidential information, and as such the integrity of this data should always be a priority.

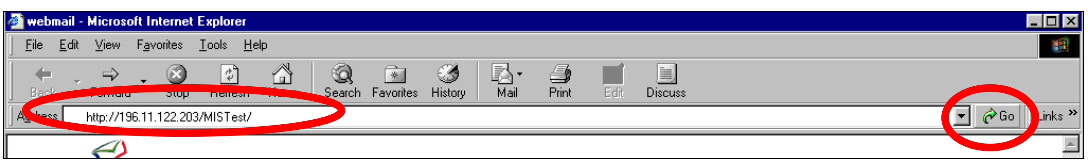
3.1 Connecting to the Internet

SDIMS is an online, web-based system that requires users to be connected to the Internet.

1. **Simply double-click on the "Internet Explorer" icon on the desktop interface.**
   The web browser will load on your computer.

2. **Enter the IP address for SDIMS in the address bar directly under the tool bar in Internet Explorer.**

Note: Training Environment is different from the Live Environment; please make sure you are using the correct one.



3. **Press ENTER on the keyboard or click the "Go" icon on screen, adjacent to the address bar.**

   The SDIMS Login screen loads. Input boxes labelled "**User Name**" and "**Password**" should be visible.

3.2 Logging on to SDIMS

In order to gain access to SDIMS, each user needs to supply the system with a unique user name and password combination. User names are employee PERSAL numbers, and passwords are assigned to each user by the systems administrator. Officials, who are not in possession of a password, should contact the systems administrator.

The procedure for logging in is as follows:

1. **Enter your user name (PERSAL number) AND password.**
   Both the user name (PERSAL number) and password are required for login.

Note: ***If you enter either of the inputs incorrectly***, you can use the "Clear" button to remove all entered text on the screen and begin again.

2. **Press ENTER on the keyboard or click on the "Login" button on the screen.**
   The system automatically verifies your user name and password.

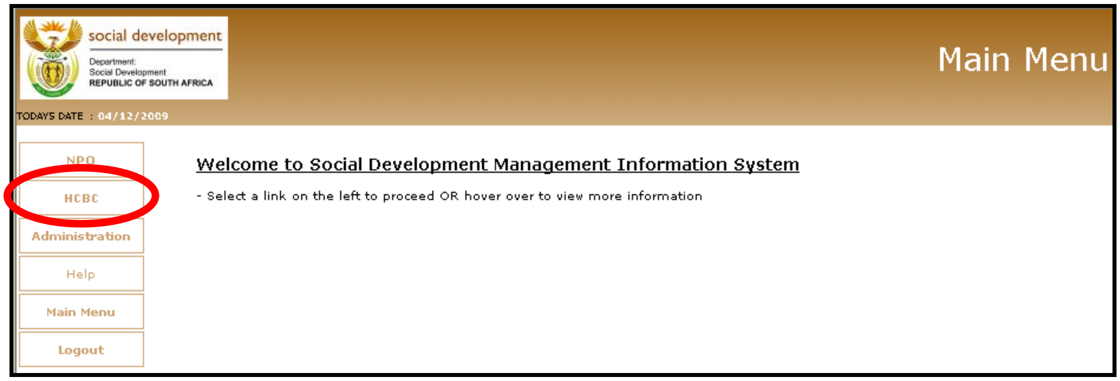
Note: ***If either of the inputs is missing***, the system will display a message, "For these reasons your data could not be processed: User Name is required" OR "For these reasons your data could not be processed: Password is required". If you do not have a password, contact the systems administrator.
If either of these inputs are incorrect the system will display the error message, "Invalid username or password entered. Please try again". Check that your PERSAL number and password have been typed in correctly. Should the problem persist, contact the systems administrator to verify your access level, username and password.
If a user with the same PERSAL number and password combination are already logged in to the system, the system will automatically terminate the session of the previously logged on Official. At no time should any one else be in possession of your unique user name and password combination. Report this immediately to the systems administrator.

3. **Once the user name and password combination is accepted by the system, you are logged in to SDIMS.**

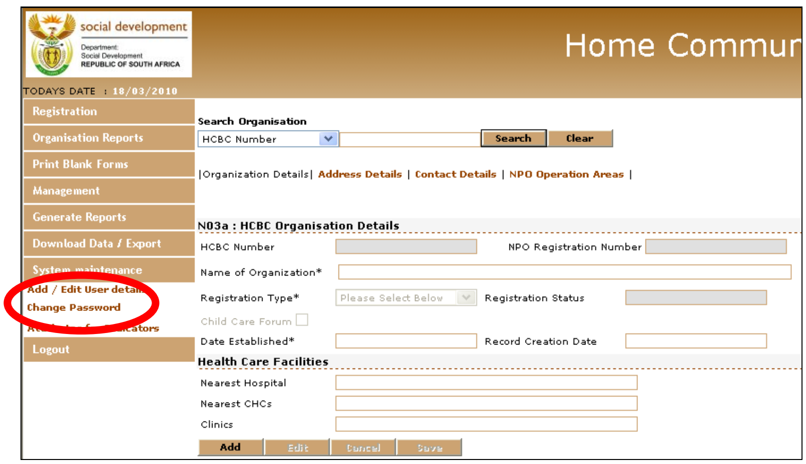
3.3 Changing a user password

1. Users can change their own passwords at any time.

2. Once the user is logged into the system, the user should select "**Administration**" from the (SDIMS) main menu.

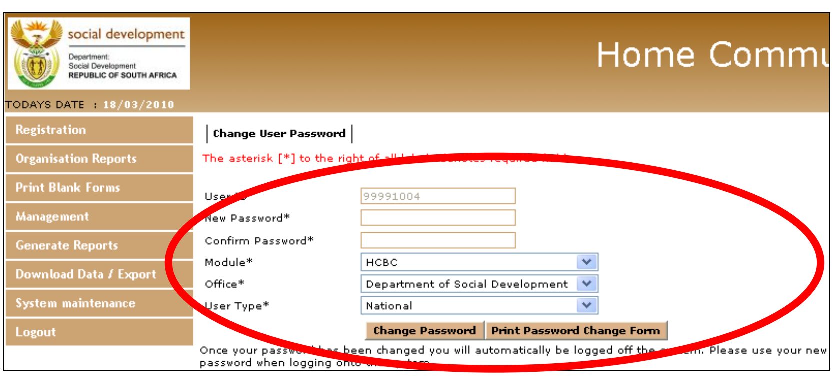


3. The user should select "**System Maintenance**" from the HCBC main menu.



4. The "**System Maintenance"** submenu will Expand
5. Select "**Change Password"** button on the administration menu.

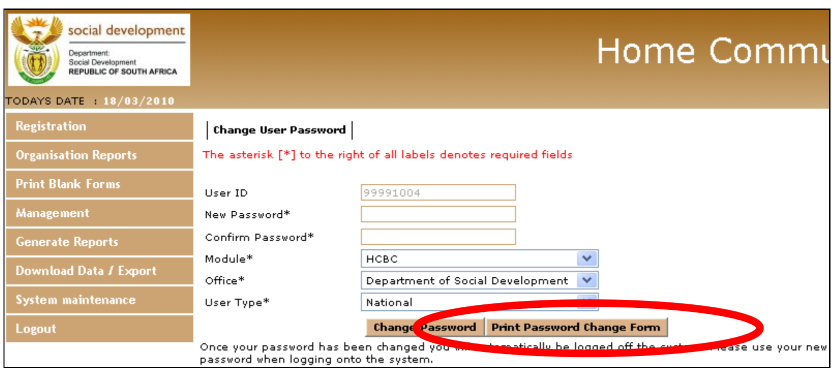
6. The "**Change User Password**" screen loads. The user's current password and persal are automatically entered into the appropriate fields.



7. Enter the new password in the field labelled; "**New Password**"

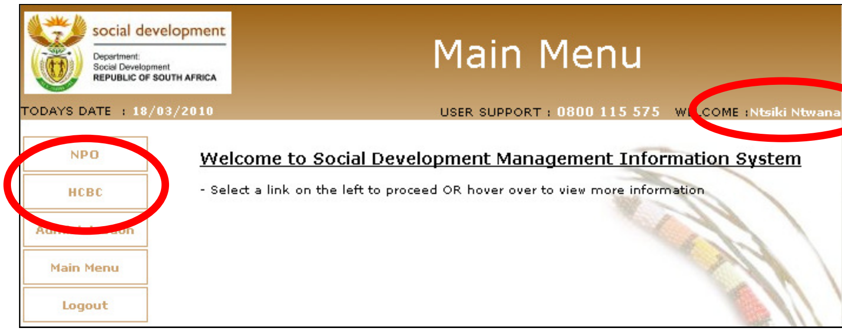
8. Enter the new password a second time in the "**Confirm Password**" field.
9. Select "**Module**" from the drop down list
10. Select "**Office**" from the drop down list
11. Select "**User Type**" from the drop down list
12. Click on the "**Change Password**" button.

13. The system will take you to the login screen; you will have to type in your new login detail.
    - You can also print the password reset form by clicking on the "**Print Password Change Form**" button.
    - The password reset form will be display.
    - Click from the Internet explorer menu option; "**File" → "Print".**



14. **Select "HCBC" from the Main Menu.**

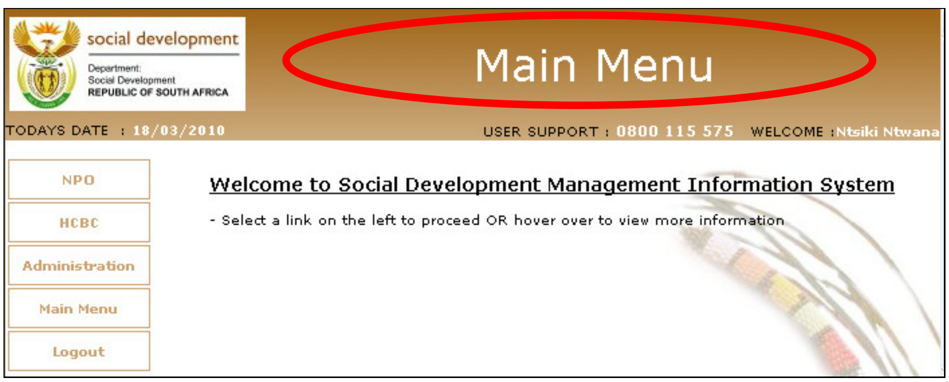
The Main Menu screen appears. Selecting "**HCBC**" from the navigation bar on the left hand side of the screen, allows the user to gain access to the Home Community-Based Care Module.



15. **When the mouse pointer is positioned over any of the buttons in the navigation bar, a description of the relevant module will appear in the text block to the right of the navigation bar.**
    This enables users to decide which module they need to go to.

> **Note:** That your name is visible on the top right hand side of the screen, if not please logout, and then login again.
> User security restrictions may limit the number of buttons available on the navigation bar.

16. After selecting the **"HCBC"** button on the Main Menu, the **HOME COMMUNITY-BASED CARE** main menu page loads.



Chapter 2: Registration

The ***Home Community-Based Care Module*** requires the capturing official to capture the identifying details of the organisation and personnel details working on that organisation.

The starting point of the ***Home Community-Based Care*** is "**Registration**", which is the first option on the HCBC main menu with its submenus listed below it.

The major functions of the Registration feature include the following:

1. Check if a Organisation has previously been captured
2. Capture of Organisation details
3. Capture of Organisation address details
4. Capture of Organisation's contact person details
5. Capture of NPO Operation Areas
6. Capture of Organisation's Personnel details
7. Update Personnel Qualification/Training information
8. Reassign Personnel to another level or to another organisation

Chapter 2: Registration

Learning unit 1: Organisation Search

Outcomes

- ✓ Search for the organisation from the database using different search methods.
- ✓ Navigate through the system to view organisation information that was captured previously.

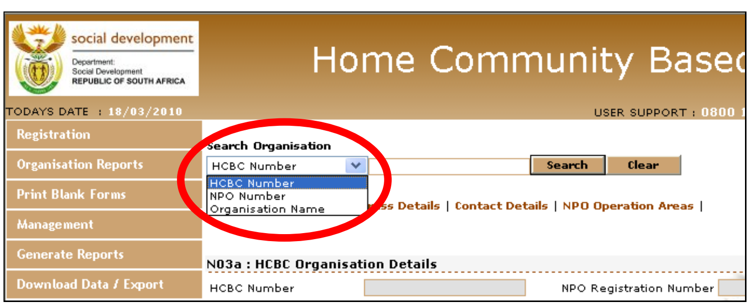
1. Searching for Organisation

1. Information from the manual input tool form must be used to update the online ***Home Community-Based Care;*** the forms are loaded on the system and can be printed at any point.

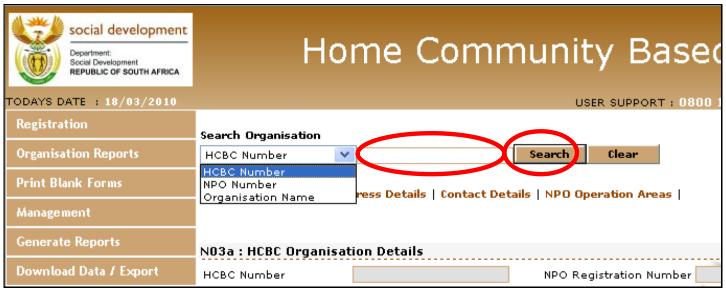
2. Before entering any information in the ***Home Community-Based Care***, the capturing official must first check to see whether the Organisation already exists in the system.

3. The Capturer can search by HCBC No, NPO No and Organisation Name.

   3.1. Click on the dropdown arrow and select preferred option.



   3.2. Enter information according to the selected search criteria.



3.3.Click the "Search" button

Note: ***If the information you entered is incorrect***, click on the "Clear" button and begin again.
If the Organisation exists in the database, all details will be loaded on screen.

Note: ***If the entered Organisation details do not exist in the database***, no Organisation information will be displayed. Use valid Organisation details and begin again, or proceed to the "Organisation Details" hyperlink to capture the details of this new Organisation.
A message "***** No results were found for HCBC Number 100 *****" will be displayed

Chapter 2: Registration

Learning unit 2: HCBC Information Capturing

Outcomes

- ✓ Capture relevant Organisation information on the system.
- ✓ Edit previously captured Organisation information

1. Organisation Details

1. "**Organisation Details**" is the first point of capture for a new Organisation.

Note: Capturing Official will always check if an Organisation is already in the system before capturing new Organisation details (see "Organisation Search" above). This is extremely important in order to avoid duplication in the system.

1.1.Click the "Add" button

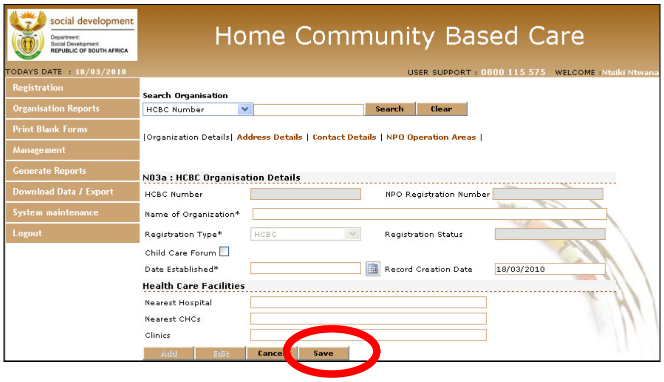
1.2. Click in each field to capture the Organisation's details OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database or be assigned a HCBC number if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change from time to time.

- ***HCBC Number:*** This field is generated by the system and cannot be entered or changed by the Capturer
- ***NPO Registration Number:*** This field will be displayed automatically but only if the organisation has been registered on the NPO Module, it cannot be entered or changed by the Capturer.
- ***Name of Organization***
- ***Registration Type:*** This field is defaulted to display "**HCBC**"; it cannot be entered or changed by the Capturer. If the organisation has been captured on the NPO Module it will display "**HCBC/NPO**".
- ***Registration Status***
- ***Child Care Forum:*** Click the box to indicate if HCBC belongs to Child Care Forum.
- ***Date Established***
- ***Record Creation Date:*** Automatically display today's date
- ***Nearest Hospital***
- ***Nearest CHCs***
- ***Clinics***

1.3 Click the "Save" button



2. Once Organisation details are saved, the system displays an information message to the Capturer regarding the saved status of the record "**HCBC number 78 was assigned to the organisation**". A HCBC number is automatically allocated to the new Organisation, visible in the "**HCBC number**" field. All fields are greyed out.

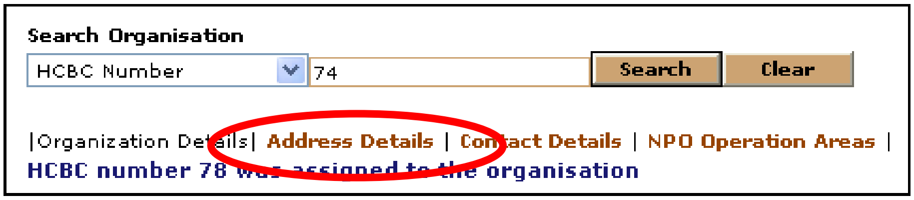
Note: ***If there is one or more required field not completed***, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.
If there are errors in the Organisation details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.
If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

3. Once all Organisation details have been captured and saved correctly, the Capturer should proceed through the sub menus from left to right on the registration screen, and complete all the forms that require Organisation data. The Capturer should pay careful attention to the mandatory fields, as data will not be able to be saved on a form where required fields have not been correctly completed.

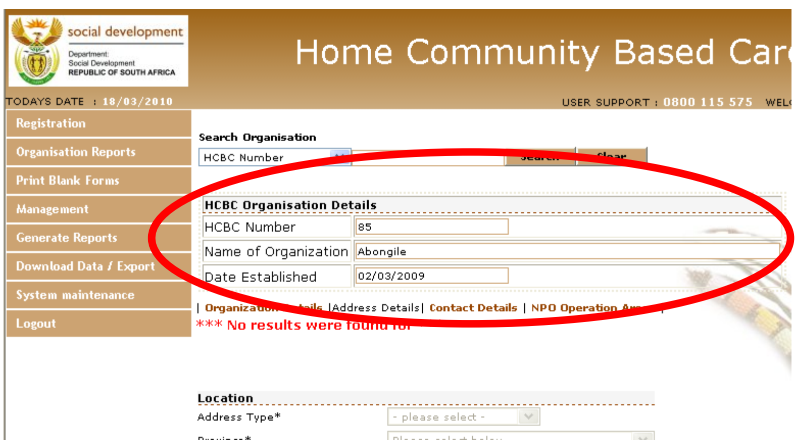
2. Address Details

1. To proceed to the next form, the capturing official should click on the text hyperlink "**Address Details**", adjacent to "**Organisation Details**". "**Address Details**" is the second sub menu of the "**HCBC Organisation**" main menu button.

Note: If Organisation was captured on the NPO Module, the system will not allow editing in the Address page of HCBC, and amendment can only be done on the NPO Module select list.

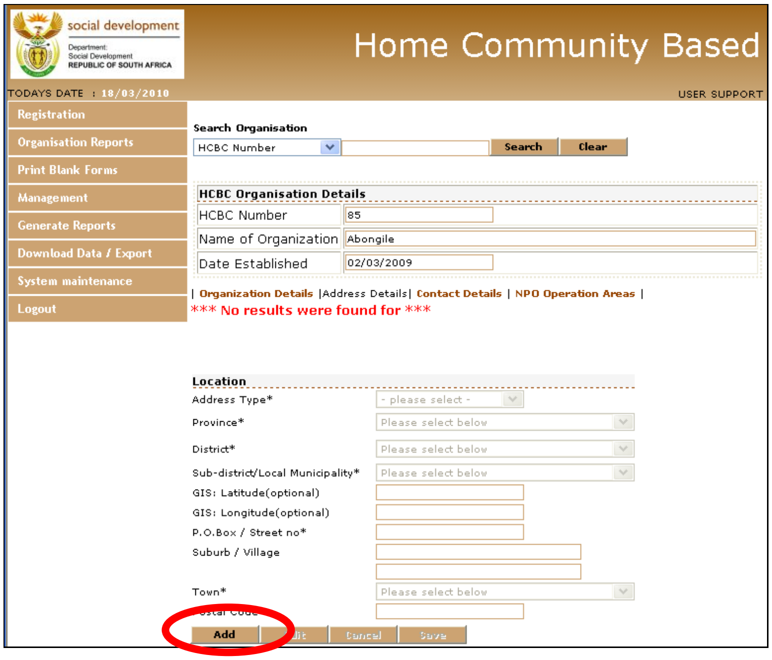


2. The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



3. Capturing official capturing new Organisations should endeavour to ensure that Address details are accurately captured and meticulously verified with the Organisation. The successful implementation of the system rests largely on reliable Address information. Without such information it is impossible to progress on an organisation monitoring in a meaningful way.

3.1. Click the "Add" button



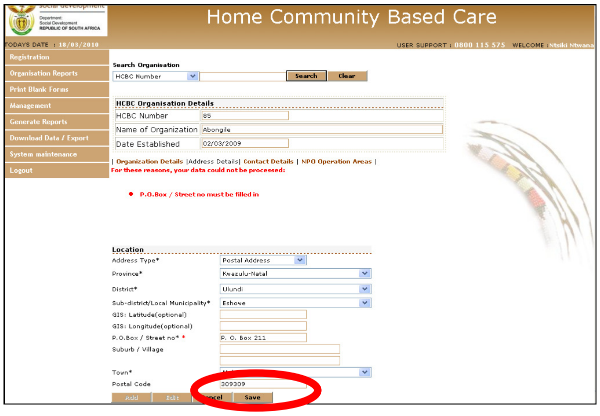
3.2.Click in each field to capture the Address details OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

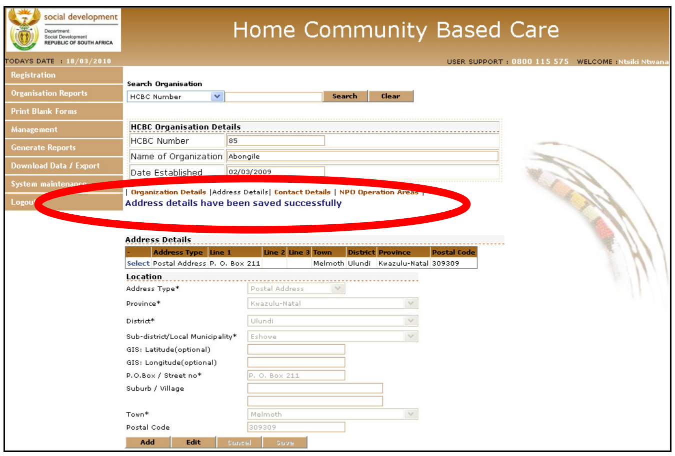
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change from time to time.

- ***Address type***: an organisation cannot have more that one address per address type
- ***Province***: Capture select from the pre-loaded list
- ***District***: this field depends on the Province field, the system will only populate district that belong to the selected Province.
- ***Sub-district/Local Municipality***: this field depends on the District field; the system will only populate Sub-district/Local Municipality that belong to the selected District.
- ***GIS: Latitude (optional)***
- ***GIS: Longitude (optional)***
- ***P.O. Box / Street no***
- ***Suburb / Village***
- ***Town:*** this field depends on the Sub-district/Local Municipality field; the system will only populate Town that belong to the selected Sub-district/Local Municipality.
- ***Postal Code***: is automatically displayed once the Town is selected. The capture has an option to edit.

Note: If a town does not appear as an option, the Capturer should contact the module administrator and have these details added to the select list.



3.4. All Address details are saved to the database. The system displays an information message to the Capturer regarding the saved status of the record. All fields are greyed out.

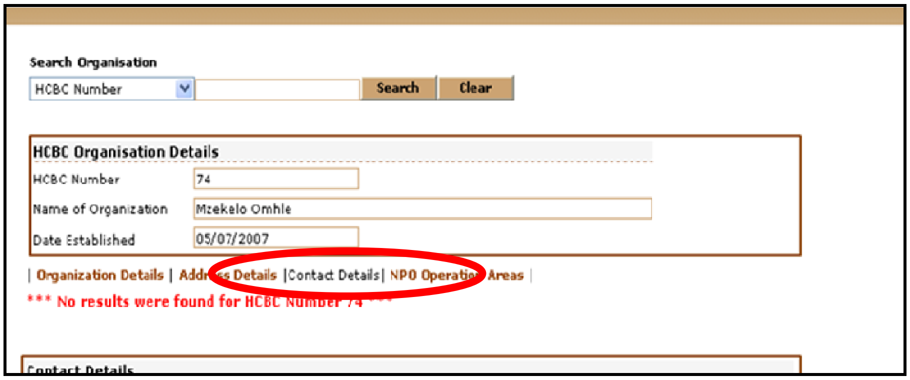


Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.
If there are errors in the Address details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.
If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

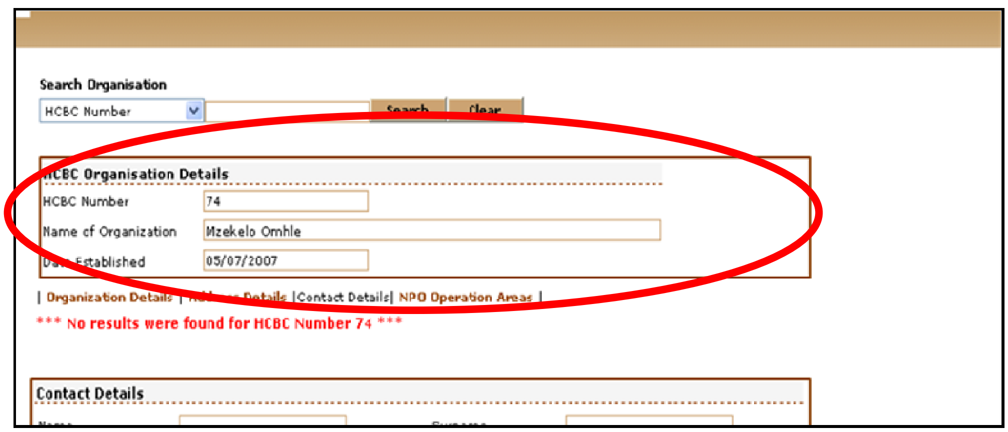
4. Once all Address details have been captured and saved correctly, the Capturer should proceed through the sub menus from left to right on the Registration screen, and complete all the forms that require Organisation data.

3. Contact Details

1. To proceed to the next form, the capturing official should click on the text hyperlink "**Contact Details**", adjacent to "**Address Details**". "**Contact Details**" is the third sub menu of the "**HCBC Organisation**" main menu button.

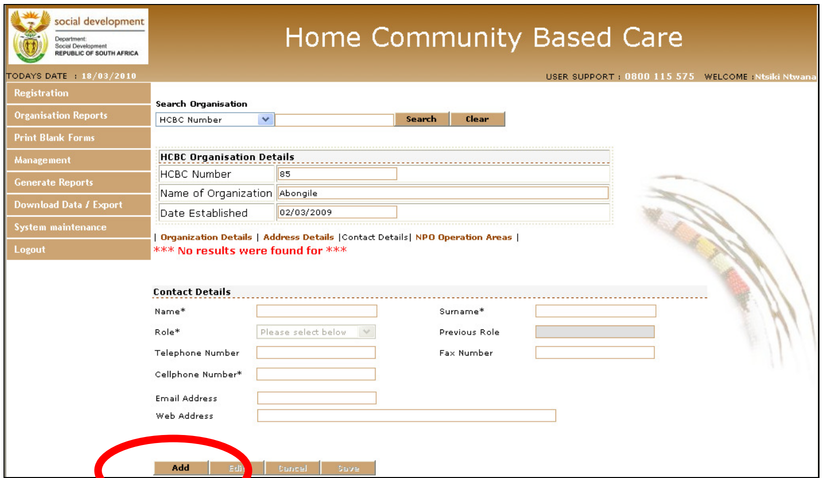


2. The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured



Note: There can only be one contact person captured in this page.

2.1. Click the "Add" button



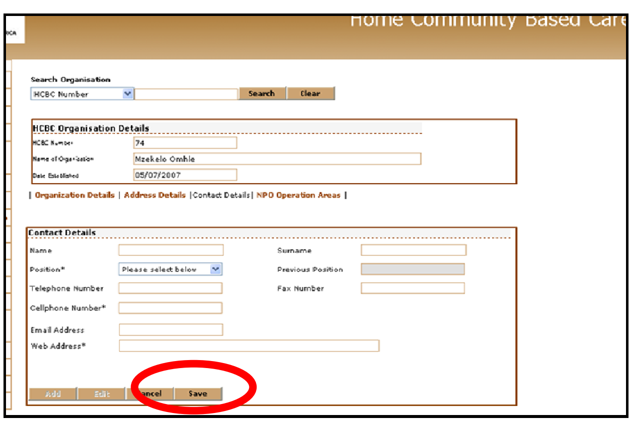
2.2.Click in each field to capture the Contact's details OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

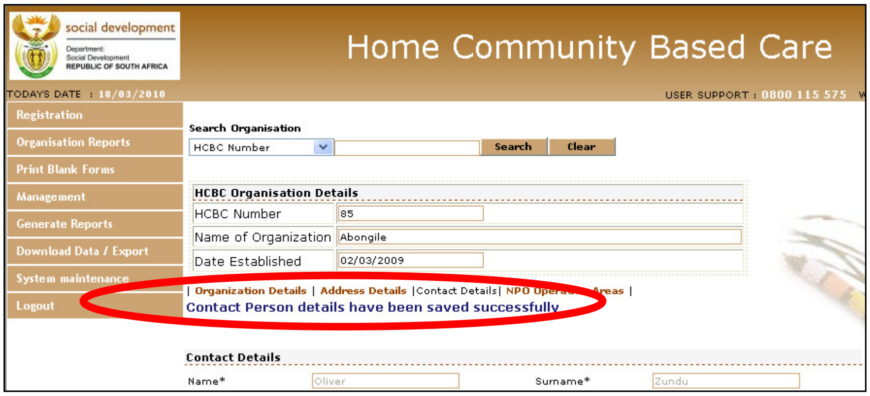
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change from time to time.

- ***Name***
- ***Surname***
- ***Position***
- ***Previous Position***
- ***Telephone Number***
- ***Fax number***
- ***Cellular number***
- ***Email Address***
- ***Web Address***

2.3. Click the "Save" button



2.4. All Contact details are saved to the database. The system displays an information message to the Capturer regarding the saved status of the record. All fields are greyed out.



Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

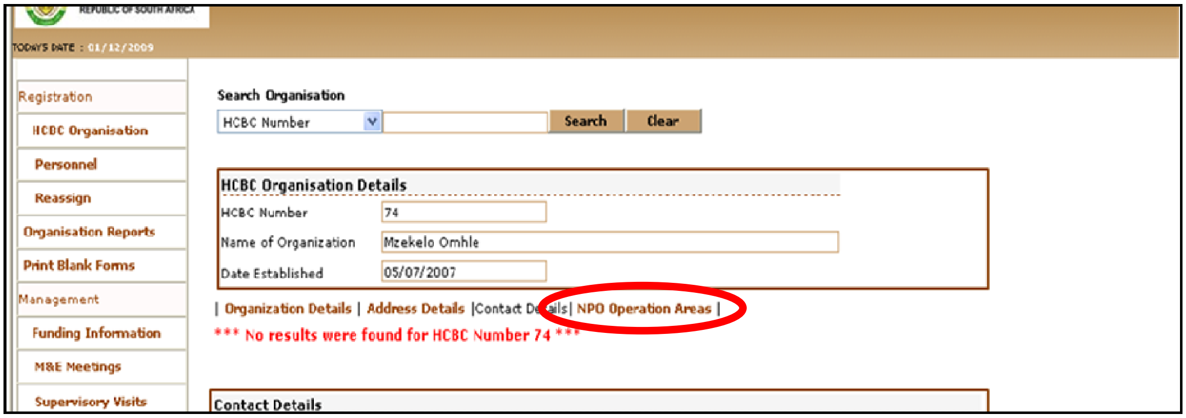
If there are errors in the Contact details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

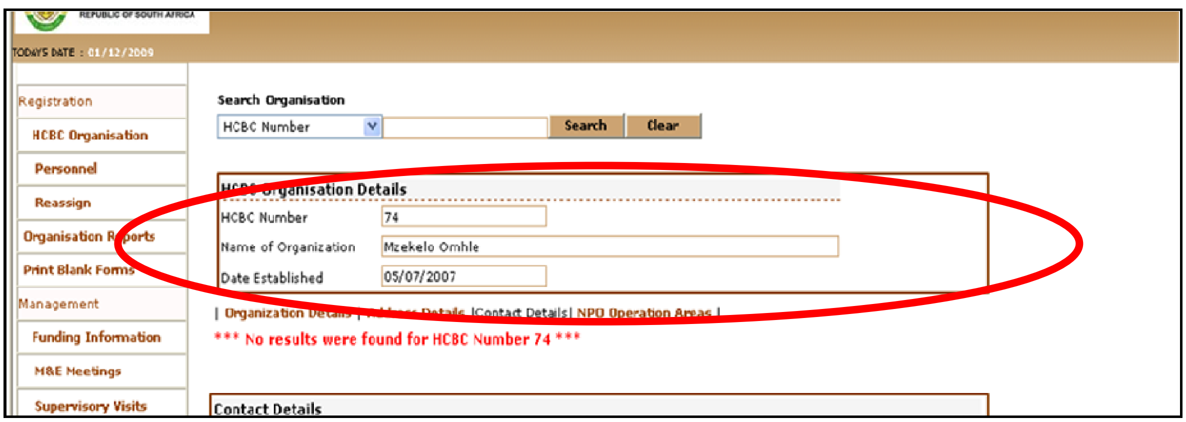
3. Once all Contact details have been captured and saved correctly, the Capturer should proceed through the sub menus from left to right on the Registration screen, and complete all the forms that require Organisation data.

4. NPO Operation Areas

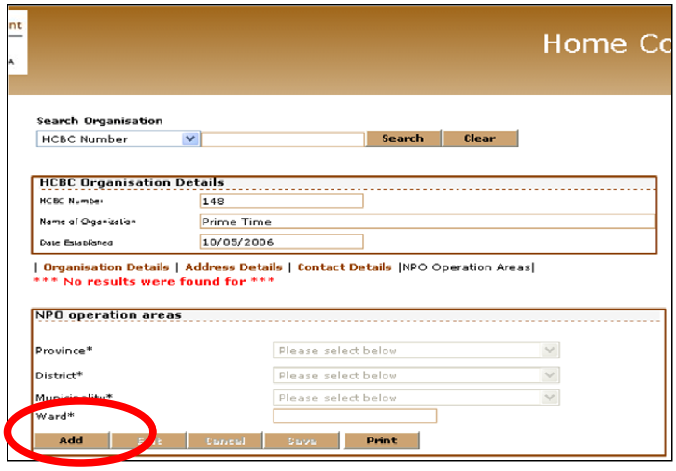
1. To proceed to the next form, the capturing official should click on the text hyperlink "**NPO Operation Area**", adjacent to "**Contact Details**". "**NPO Operation Area**" is the fourth sub menu of the "**Registration**" main menu button.



2. The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



2.1.Click the "Add" button



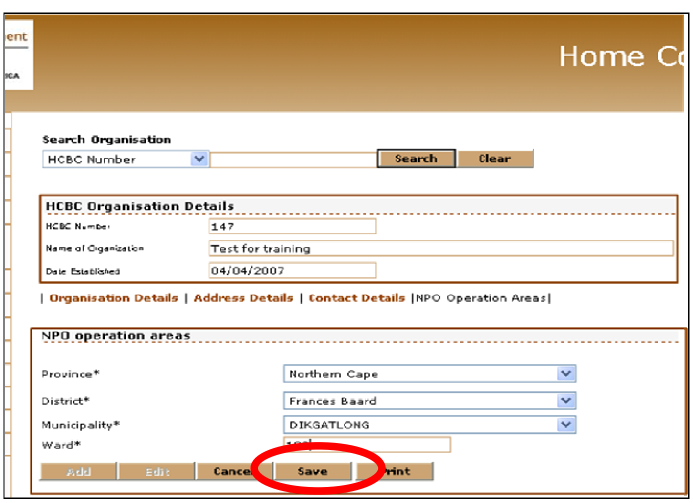
3.2Click in each field to capture the NPO Operation Area OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

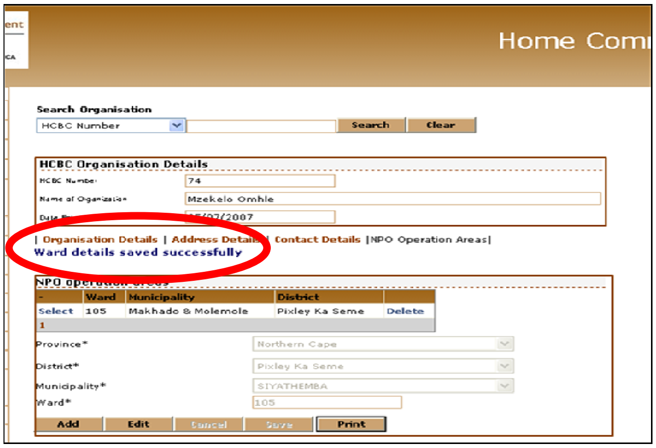
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change form time to time.

- ***Province***: Capturer select from the pre-loaded list
- ***District***: this field depends on the Province field, the system will only populate district that belong to the selected Province.
- ***Municipality***: this field depends on the District field; the system will only populate Municipality that belong to the selected District.
- ***Ward:***

3.3Click the "Save" button

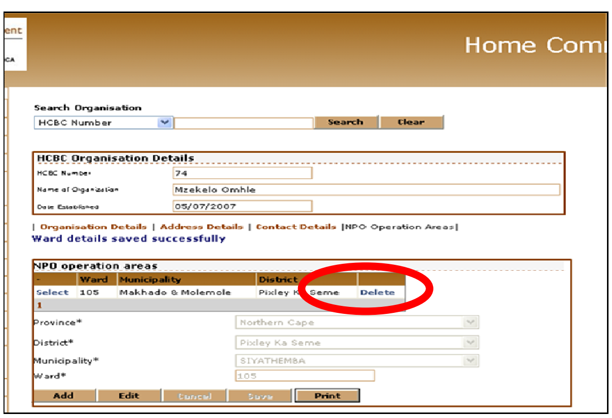


3. All NPO Operation Area are saved to the database. The system displays an information message to the Capturer regarding the saved status of the record. All fields are greyed out.

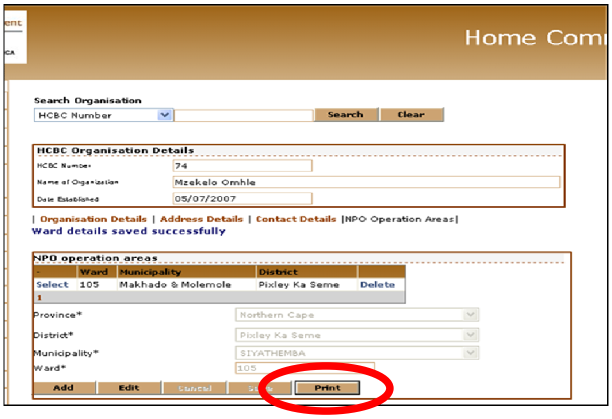


Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.
If there are errors in the NPO Operation Area details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.
If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

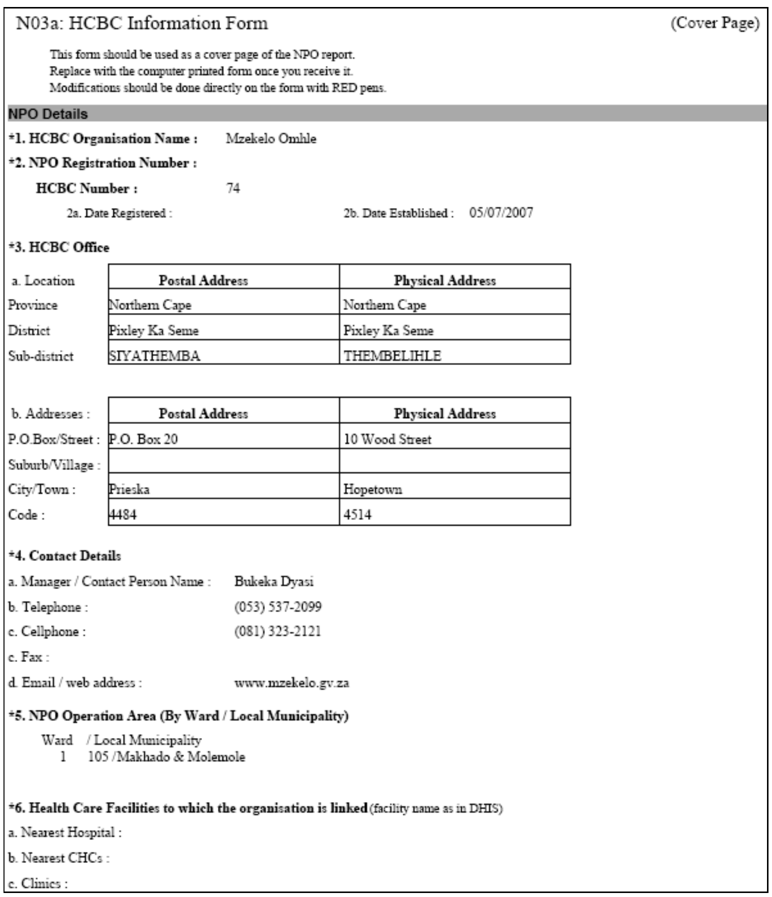
4. The capturing official can delete an operation area from the list.
   4.1. Click "**Delete**" from the grid, for the one that you want to delete.



5. The capturing official can print HCBC Information Form, which should be used as a cover page of the NPO Report.
   5.1. Click "**Print**" button.



6. HCBC Information Form will be displayed.



N03a: HCBC Information Form (Cover Page)

This form should be used as a cover page of the NPO report.
Replace with the computer printed form once you receive it.
Modifications should be done directly on the form with RED pens.

NPO Details

***1. HCBC Organisation Name :** Mzekelo Omhle

***2. NPO Registration Number :**

HCBC Number : 74

2a. Date Registered : 2b. Date Established : 05/07/2007

***3. HCBC Office**

a. Location	Postal Address	Physical Address
Province	Northern Cape	Northern Cape
District	Pixley Ka Seme	Pixley Ka Seme
Sub-district	SIYATHEMBA	THEMBELIHLE

b. Addresses :	Postal Address	Physical Address
P.O.Box/Street :	P.O. Box 20	10 Wood Street
Suburb/Village :		
City/Town :	Prieska	Hopetown
Code :	4484	4514

***4. Contact Details**

a. Manager / Contact Person Name : Bukeka Dyasi
b. Telephone : (053) 537-2099
c. Cellphone : (081) 323-2121
c. Fax :
d. Email / web address : www.mzekelo.gv.za

***5. NPO Operation Area (By Ward / Local Municipality)**

Ward / Local Municipality
1 105 /Makhado & Molemole

***6. Health Care Facilities to which the organisation is linked** (facility name as in DHIS)

a. Nearest Hospital :
b. Nearest CHCs :
c. Clinics :

7. Once all NPO Operation Area have been captured and saved correctly, the Capturer should proceed through the sub menus from left to right on the Registration screen, and complete all the forms that require Organisation data.

Chapter 2: Registration

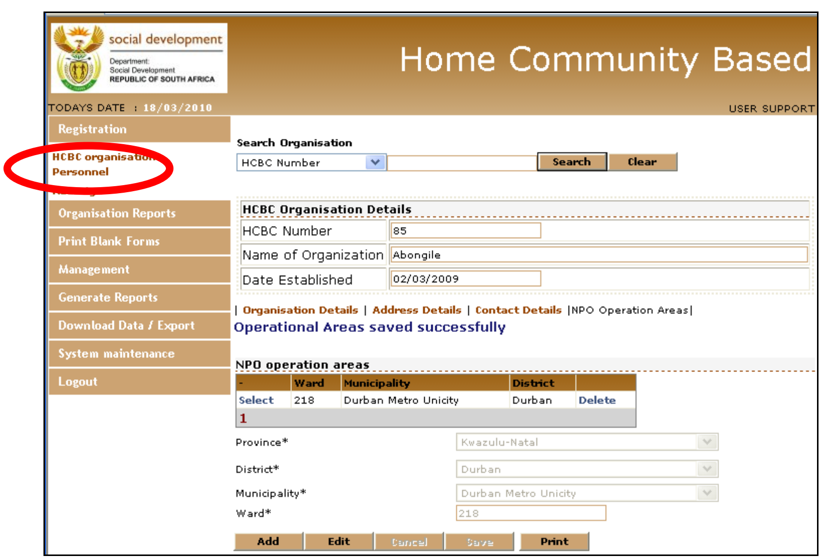
Learning unit 3: Personnel Registration

Outcomes

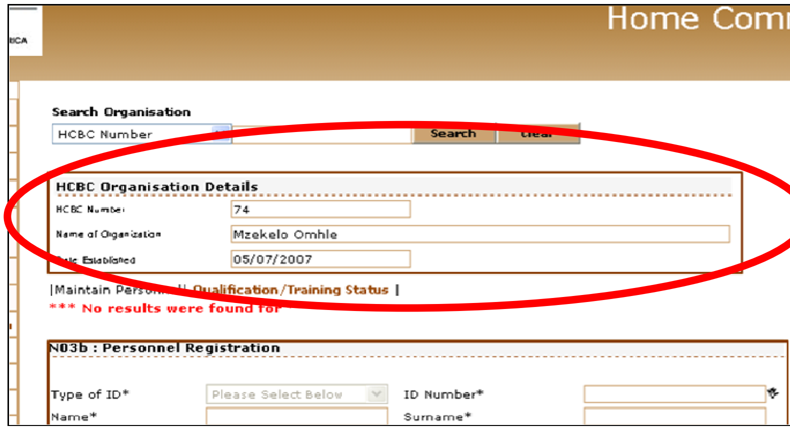
- ✓ Capture Personnel information on the system.
- ✓ Edit previously captured Organisation information

1. Personnel Maintenance

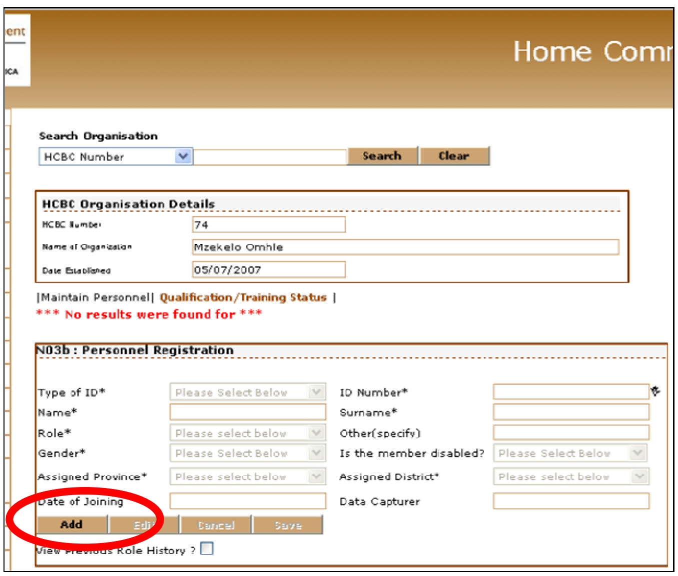
1. To proceed, the Capturing official should click on the text next sub-menu of Registration called "**Personnel**", below "**HCBC Organisation**" sub-menu.



2. The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



2.1. Click the "Add" button



2.2. Click in each field to capture the personnel details OR use the drop down lists to select the appropriate option.

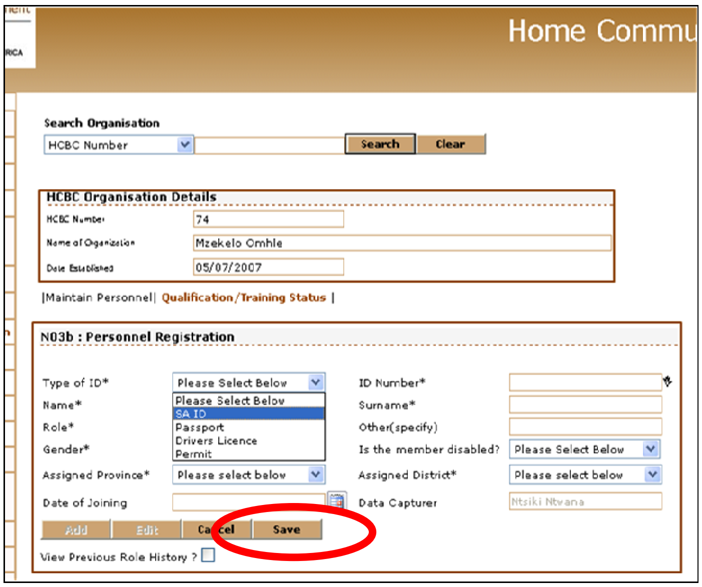
An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change from time to time.

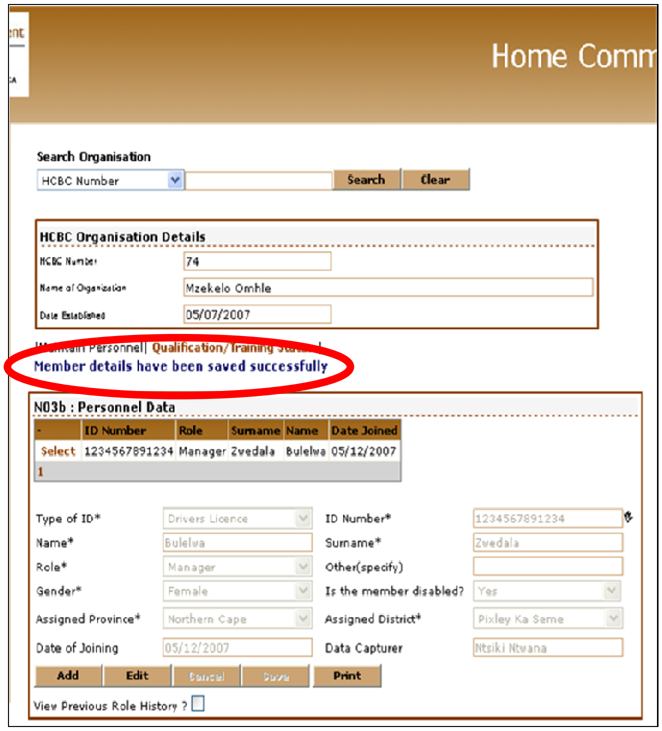
- ***Type of ID****:* Capturer select from the pre-loaded list
- ***ID Number****:* This field depend on the Type of ID field
- ***Name***
- ***Surname***
- ***Role****:* Capturer select from the pre-loaded list
- ***Other (Specify):*** If role is not on the list.
- ***Is the member disabled***

- ***Assigned Province:*** Capturer select from the pre-loaded list
- ***Assigned District:*** this field depends on the Province field, the system will only populate district that belong to the selected Province.
- ***Date joined***
- ***Data Capturer:*** Automatically display the person currently logged in.
- ***View Previous Role History***

3.2Click the "Save" button



3. All Personnel details are saved to the database. The system displays an information message to the Capturer regarding the saved status of the record. All fields are greyed out.



Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

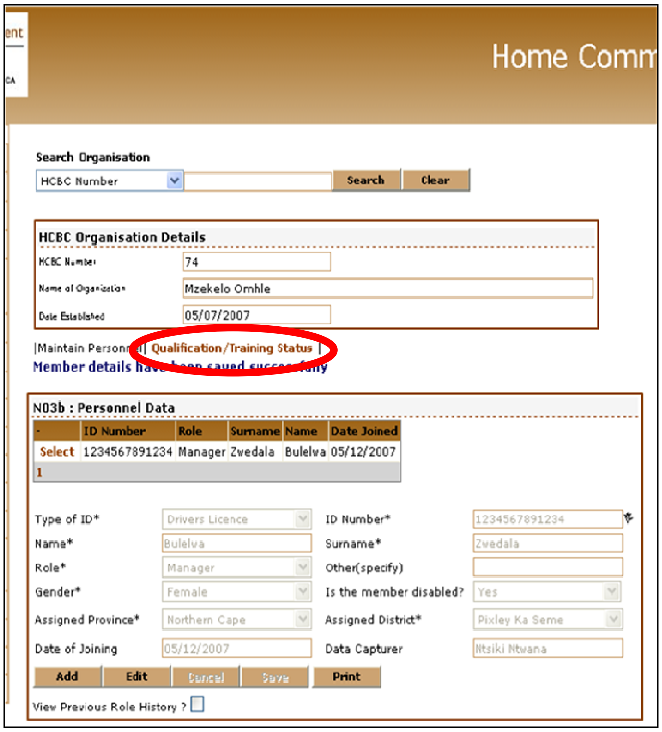
If there are errors in the Personnel Maintenance details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

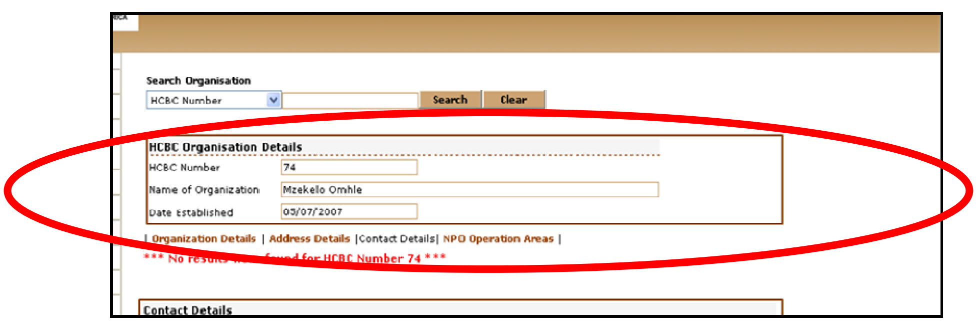
4. Once all Personnel details have been captured and saved correctly, the Capturer should proceed through the sub menus from left to right on the Registration screen, and complete all the forms that require Organisation data.

2. Qualification/Training Status

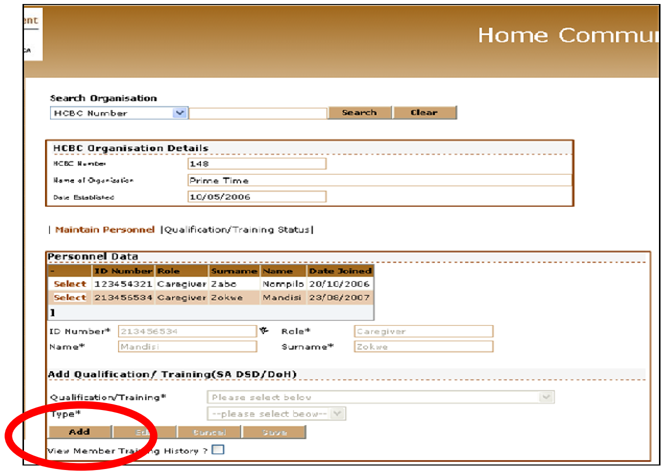
1. To proceed to the next form, the capturing official should click on the text hyperlink "**Qualification/Training Status**", adjacent to "**Maintain Personnel**". "**Qualification/Training Status**" is the second sub menu of the "**Personnel**" main menu button.



2. The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



3. A list of all Personnel in the organisation currently being captured will be displayed.
4. Click the "**Select**" next to the details of the person whose details need to be updated
5. Click the "**Add**" button



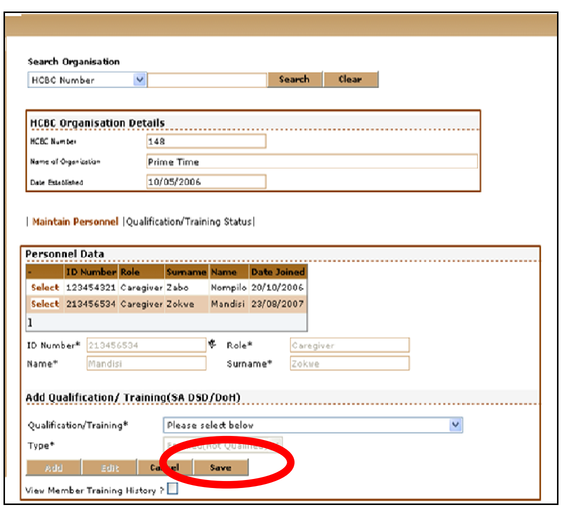
6. Click in each field to capture the Qualification/Training OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

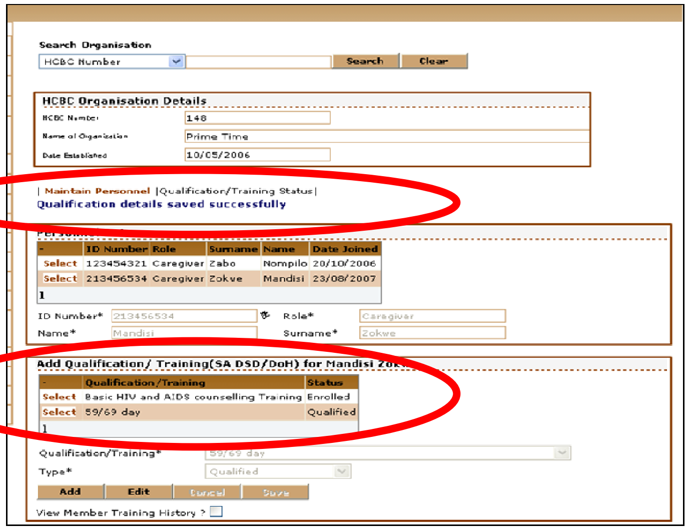
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change form time to time.

- ***Qualification/Training***: Capturer select from the pre-loaded list
- ***Type***: this field depends on the Qualification/Training field.
- ***View Member Training History***:

7. Click the "Save" button



8. All Qualification/Training are saved to the database. The system displays an information message to the Capturer regarding the saved status of the record. All fields are greyed out. The system will display a list of all Qualification/Training captured for the selected person.



Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

If there are errors in the Qualification/Training details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

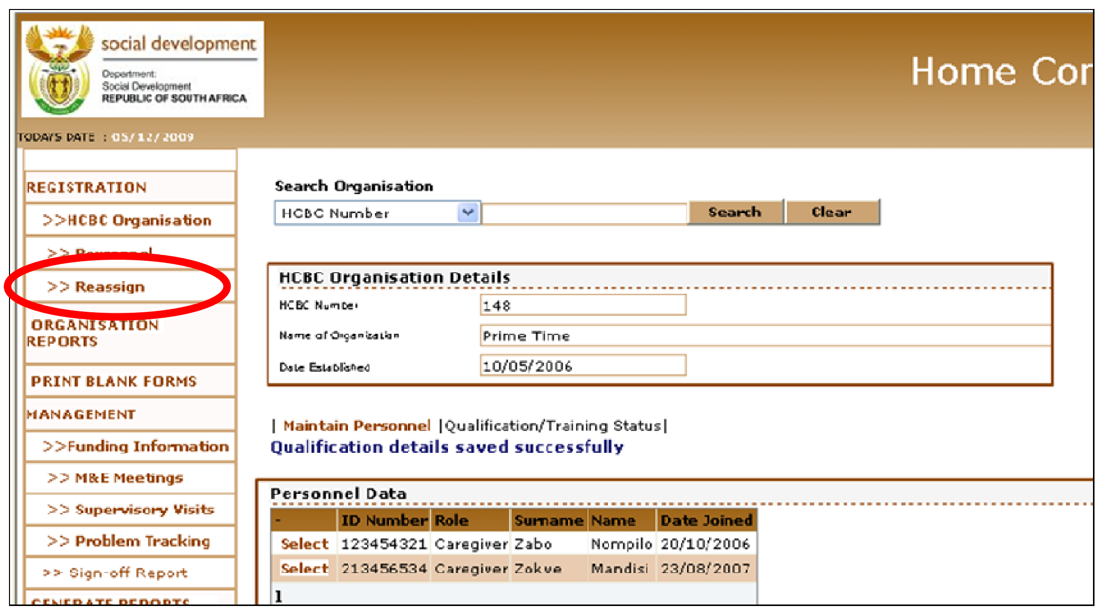
Learning unit 4: Reassign

Outcomes

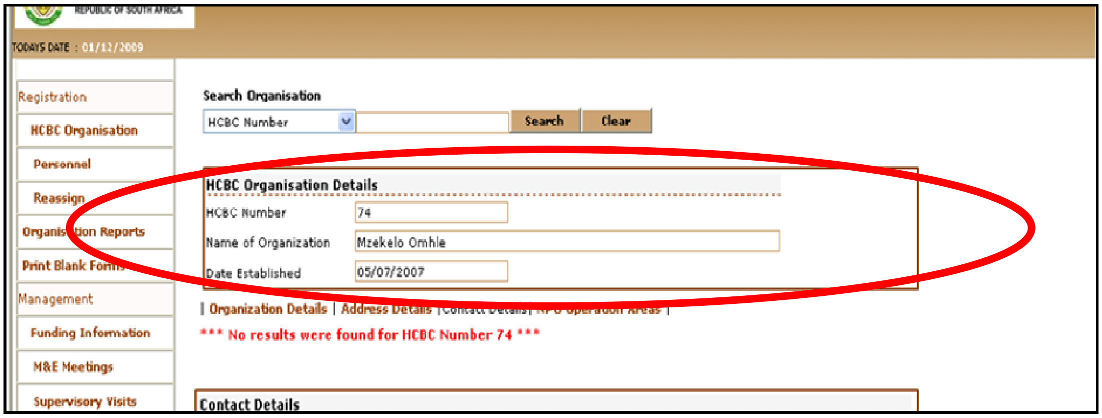
- ✓ Reassign member of Organisation from one level to another.
- ✓ Reassign member from one Organisation to another.

1. Reassign Personnel

1. To proceed, the Capturing official should click on the text next sub-menu of Registration called "**Reassign**", below "**Personnel**" sub-menu.

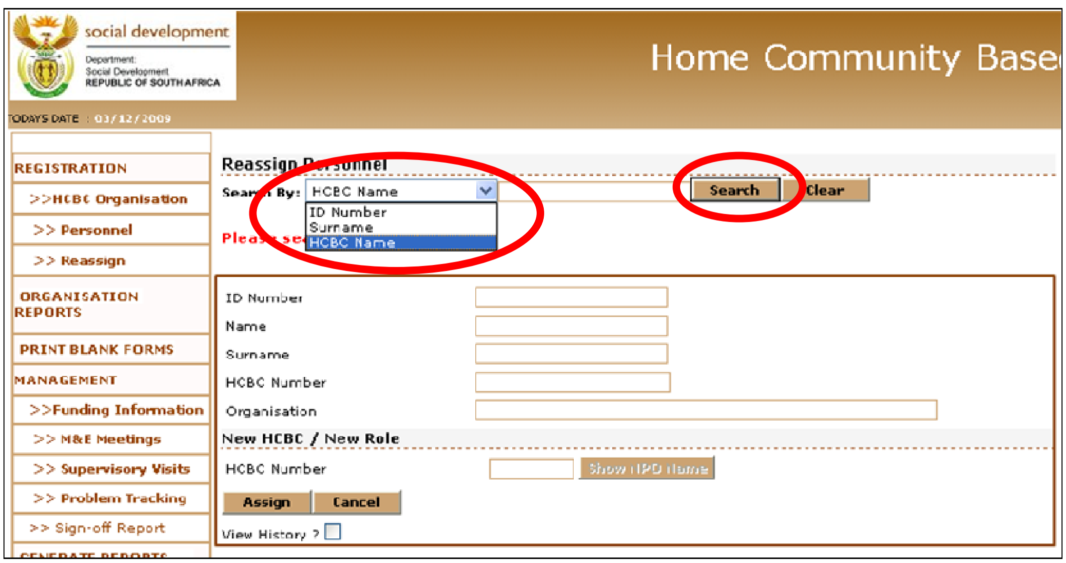


2. The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



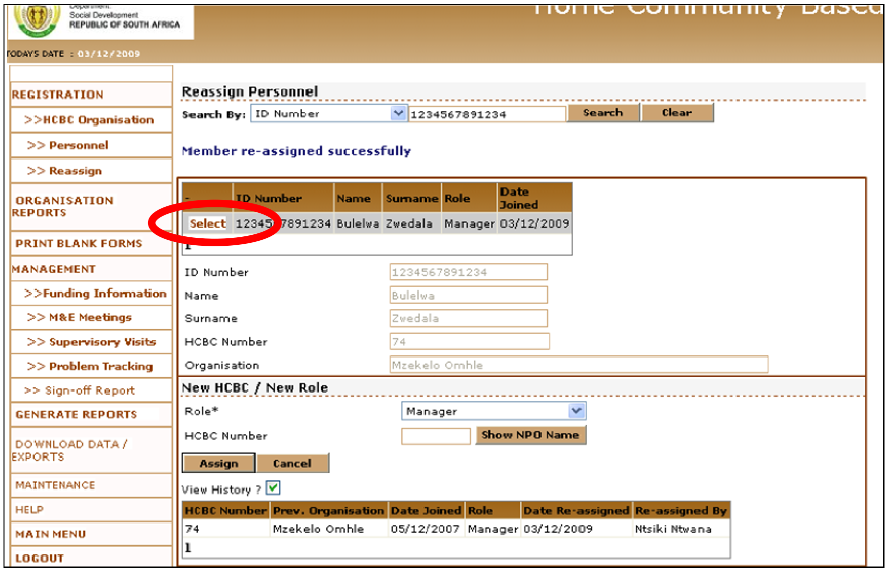
3. The Capturing Official can reassign a member to another level or to another organisation.

- **Search either by member's ID Number or Surname or HCBC Name**
- **Click on the dropdown arrow and select preferred option.**
- **Enter information according to the selected search criteria.**
- Click "**Search**" button



Note: If the capturer searched by ID Number, Member's details will be displayed.
If the capturer searched by Surname, everyone in the database with that surname, their details will be displayed.
If the capturer searched by HCBC Name, details of all the Members in that organisation will be displayed.

- Click "**Select**" next to the details of the member.



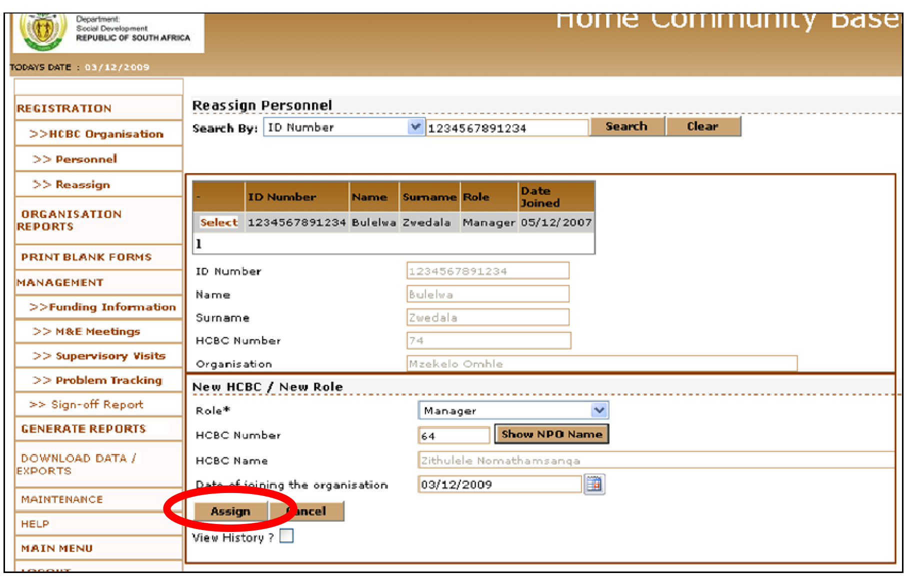
4. Click in each field to capture the Reassignment information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

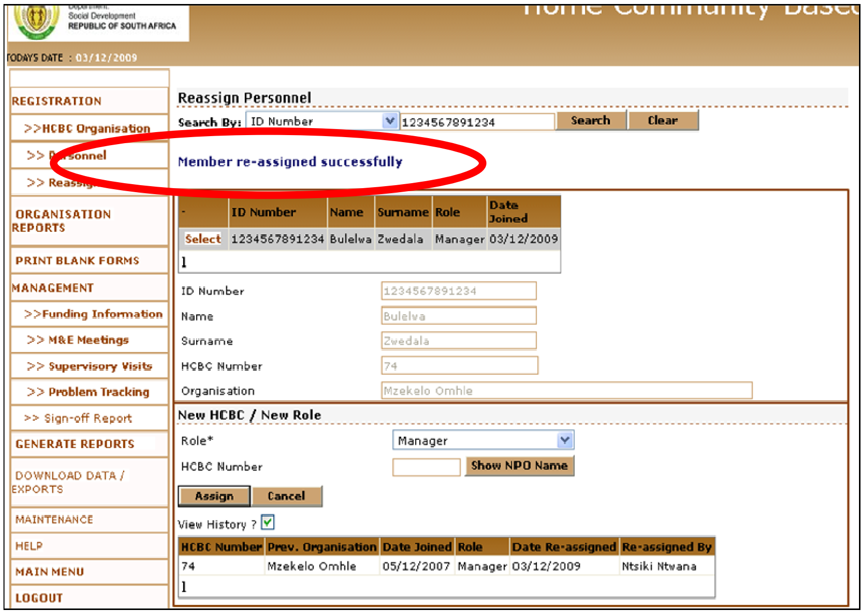
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change from time to time.

- ***Role***
- ***HCBC number***

- Click **"Show NPO Name".**
- HCBC Name and Date of joining the Organisation are displayed.
- Click "**Assign**" next to the details of the member**.**



5. Information saved to the database. The system displays an information message to the Capturer regarding the saved status of the record. All fields are greyed out.



Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

If there are errors in the Member's re-assignment details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

Chapter 3: Organisation Reports

The ***Home Community-Based Care*** requires the capturing official to capture the Organisation reports.

This is the second option of HCBC main menu with its submenus listed below it.

The major functions of the "Organisation Reports" include the following:

1. Capture and validate Organisation Reports
2. Capture Monthly Stipend
3. Capture Monthly Service
4. Capture Quarterly Reports

Chapter 3: Organisation Reports

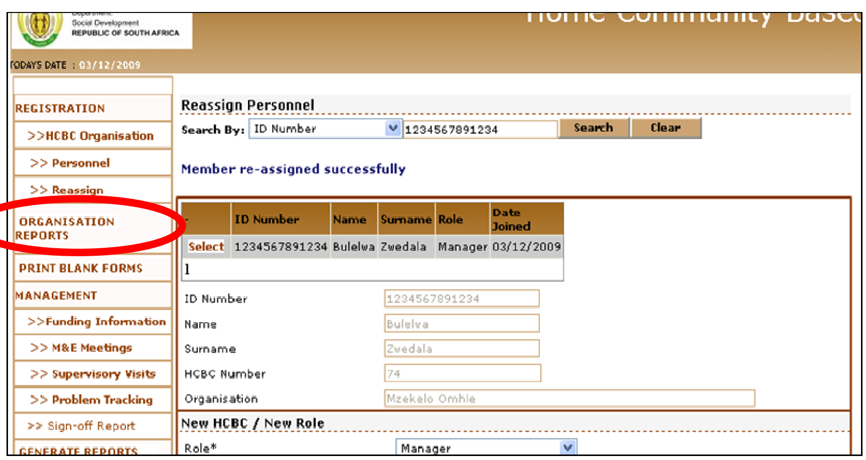
Learning unit 1: Organisation Report

Outcomes

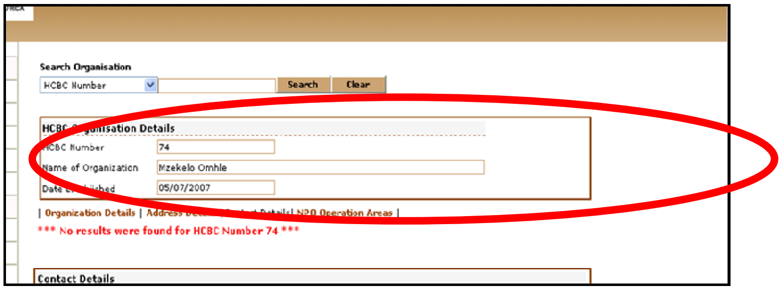
- ✓ Capture and validate Organisation Reports
- ✓ Amend Organisation Reports that were previously captured

1. Organisation Report

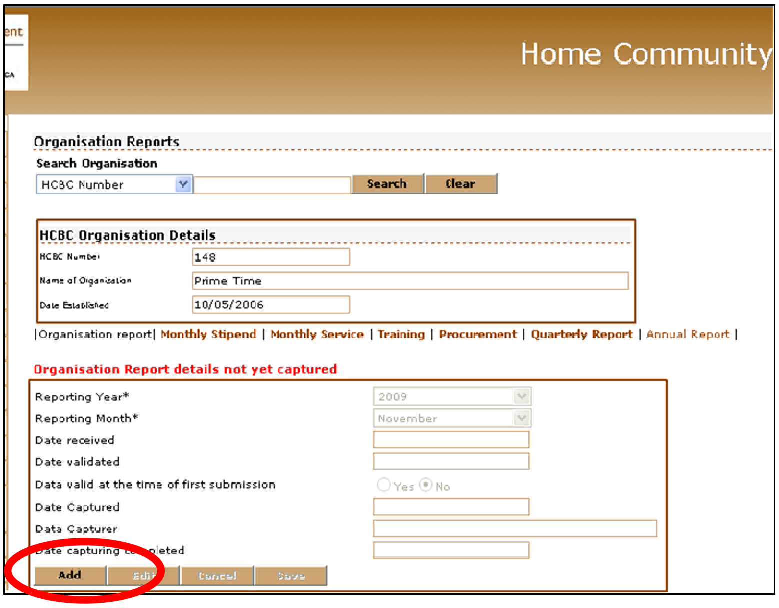
To proceed, the Capturing official should click on the next option of the main menu "**Organisation Reports**", below "**Reassign**" sub-menu.



The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



Click the "**Add**" button



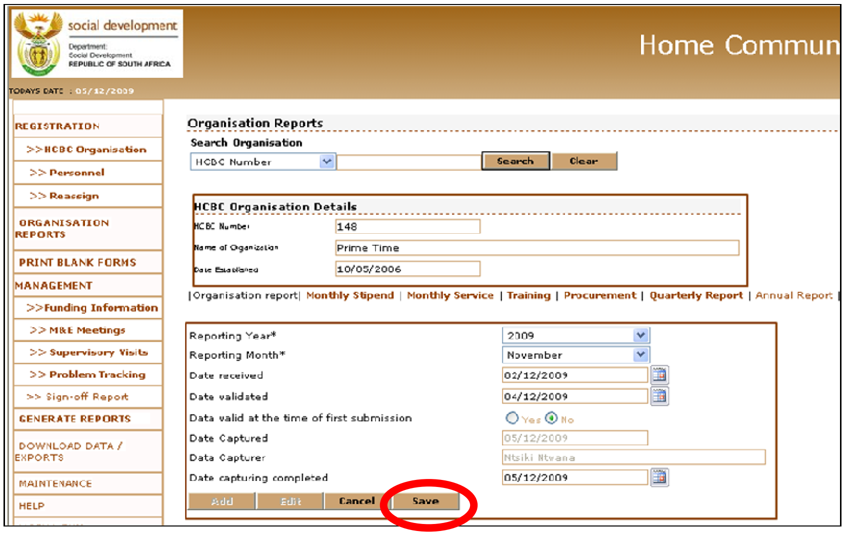
Click in each field to capture the Organisation Report details OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

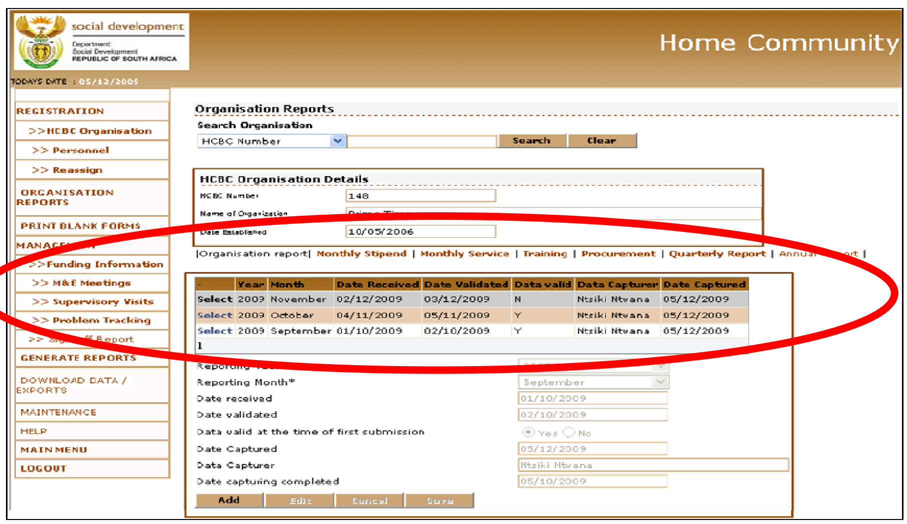
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- ***Reporting Year***
- ***Reporting Month***
- ***Date of received***
- ***Date of validated***
- ***Date valid at the time of first submission***
- ***Date Captured:*** *defaulted to today's date*
- ***Data Capturer:*** Automatically display the person currently logged in.
- ***Date Capturing Completed***

Click the "**Save**" button



All Organisation Reports details are saved to the database. The system displays a list of all reports received and captured.



Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

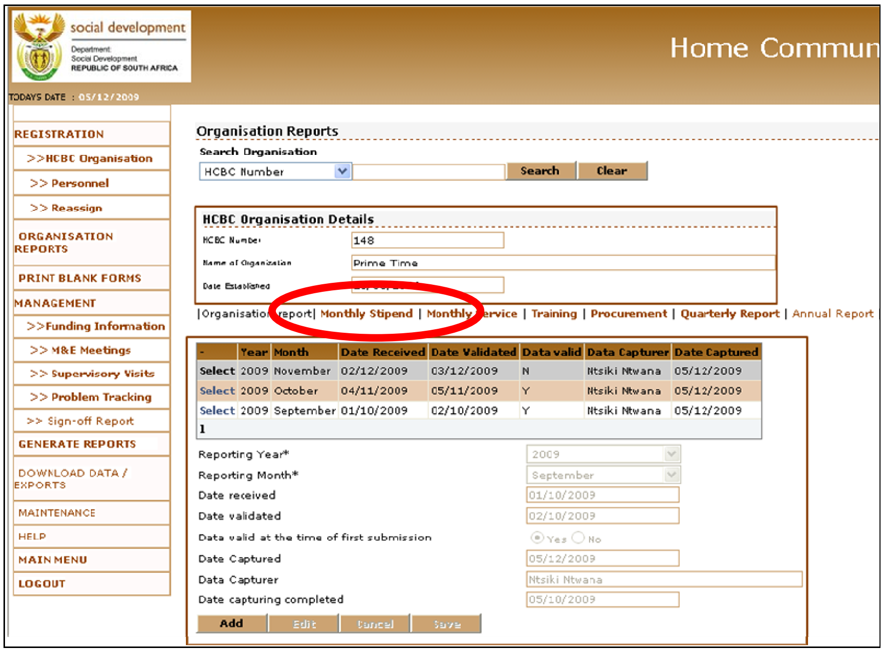
If there are errors in the Organisation Report details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

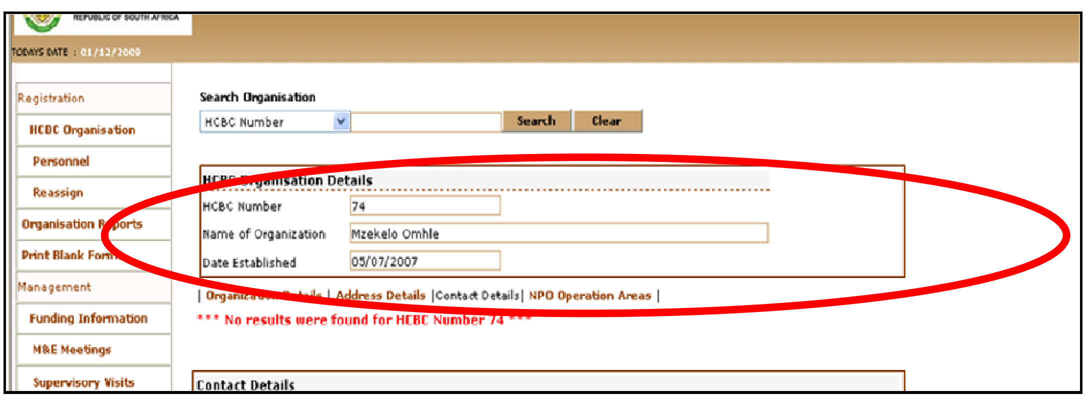
2. Monthly Stipend

To proceed, the capturing official should click on the text hyperlink "**Monthly Stipend**", adjacent to "**Organisation Report**". "**Monthly Stipend**" is the second sub menu of the "**Organisation Reports**" main menu button.

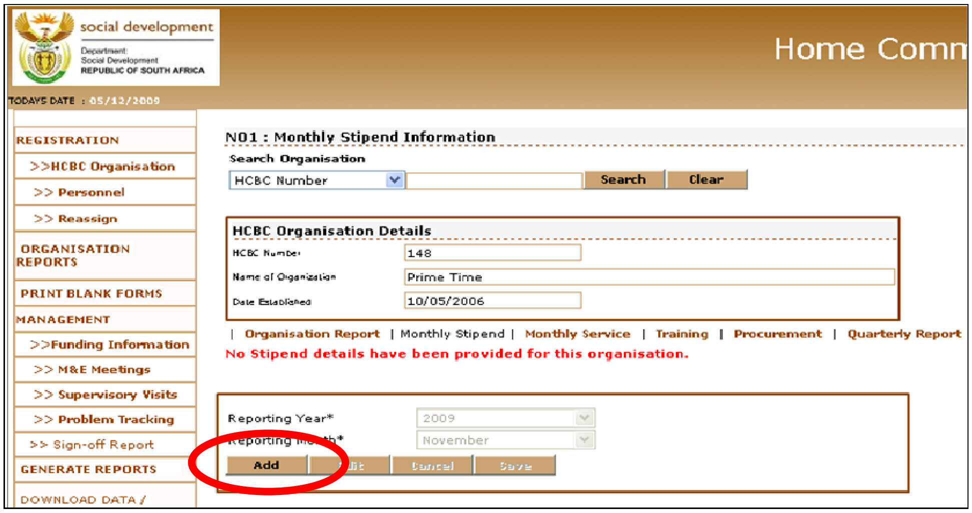
Note: The capturing official can not capture in this page if there is no information captured in the Organisation report page.



The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



Click the "**Add**" button



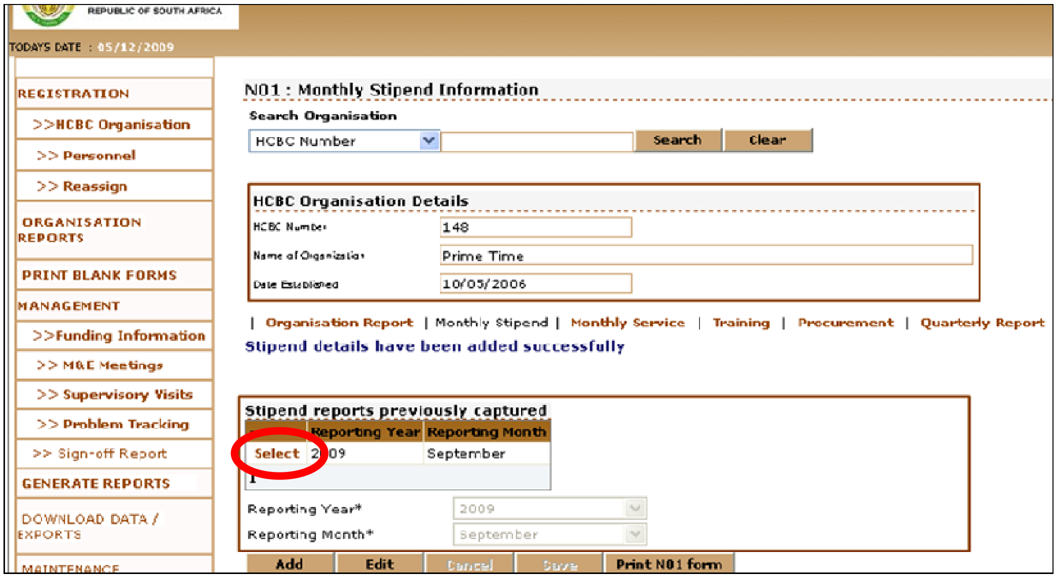
Click in each field to capture the Monthly Stipend details OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

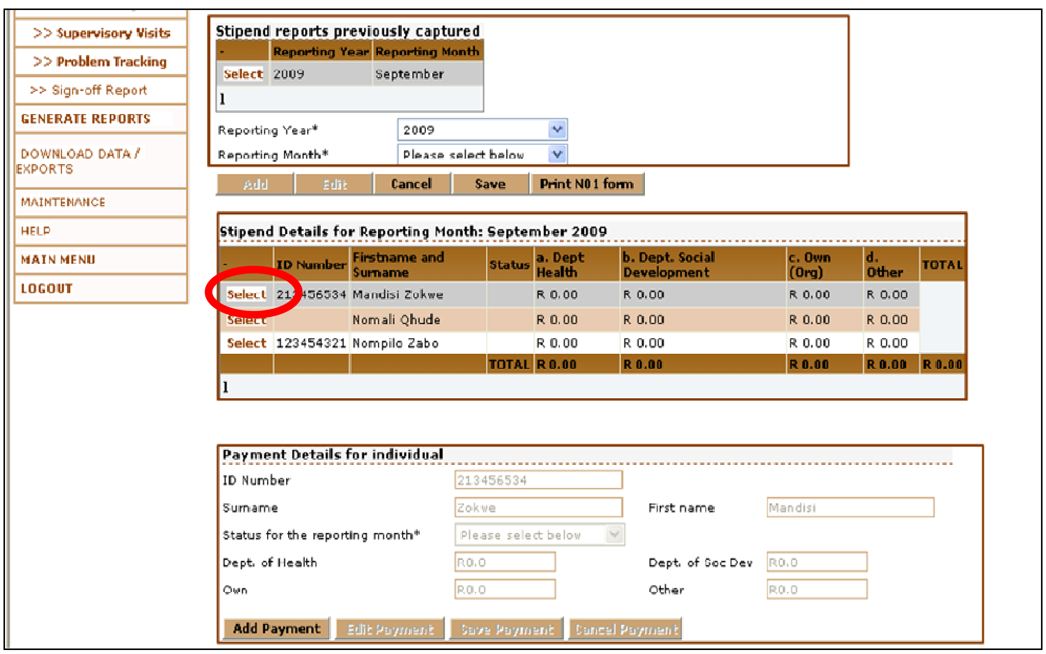
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- ***Reporting Year***
- ***Reporting Month***

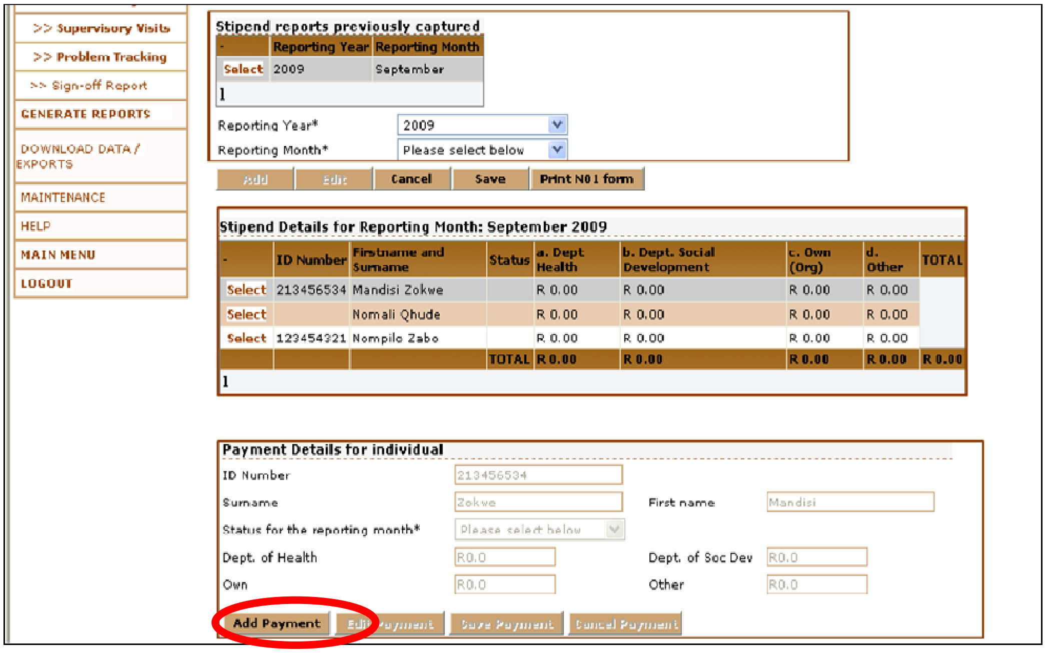
Click the "**Select**" next to the month that needs to be captured or updated



Click "**Select**" next to the name of the person to load stipend for.



Click "**Add Payment**" to load Monthly Stipend.



Click in each field to capture the Monthly Stipend OR use the drop down lists to select the appropriate option.

Status for the reporting month

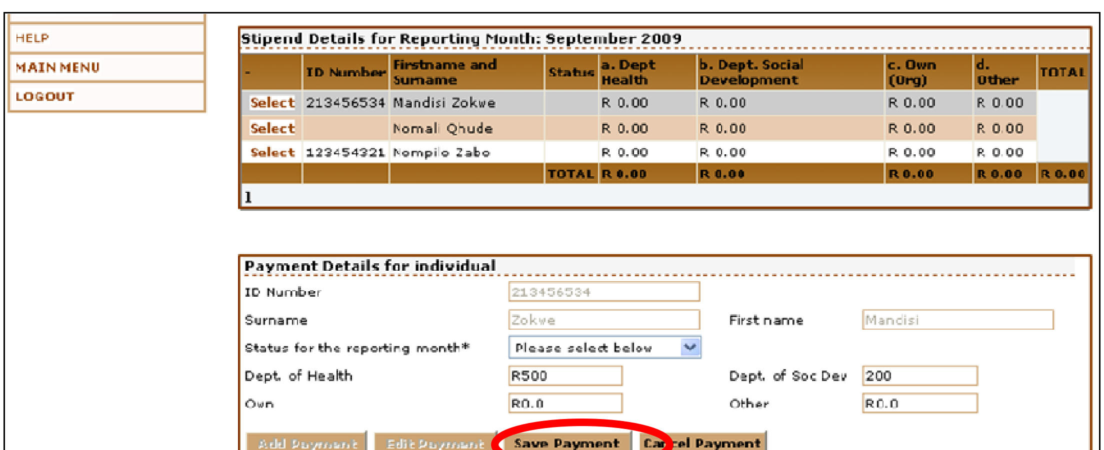
Dept. of health

Dept of Soc Dev

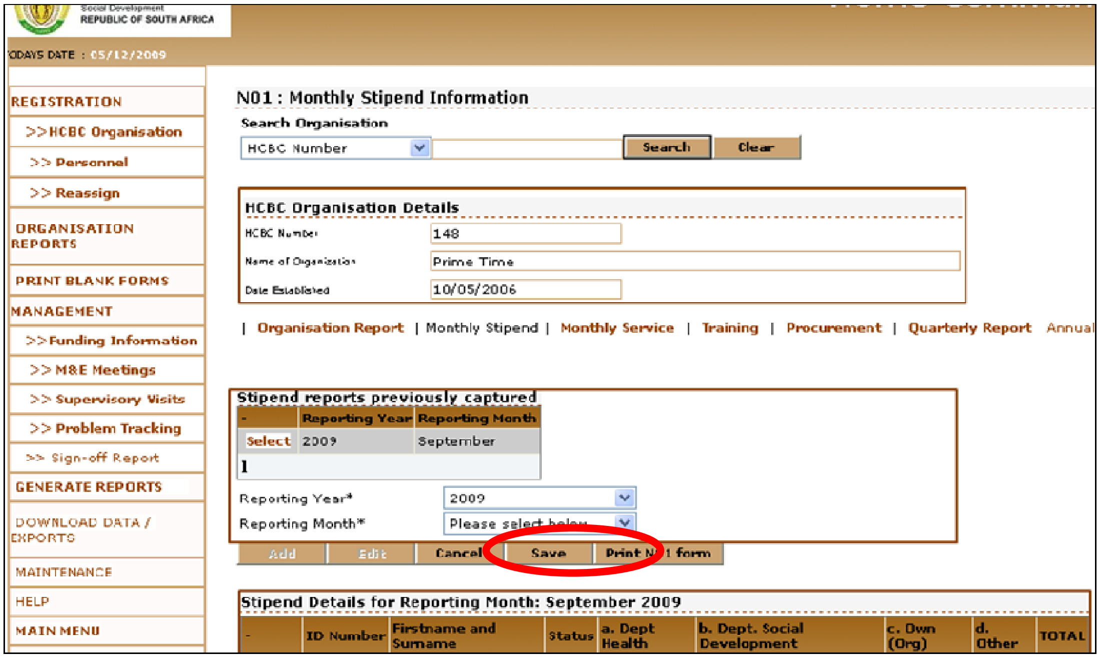
Own

Other

Click "**Save Payment**" button



Click "**Save**" button



All details for that Month Stipend are saved to the database. The system displays a list of all reports received and captured.

Note: ***If there is one or more required field not completed***, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

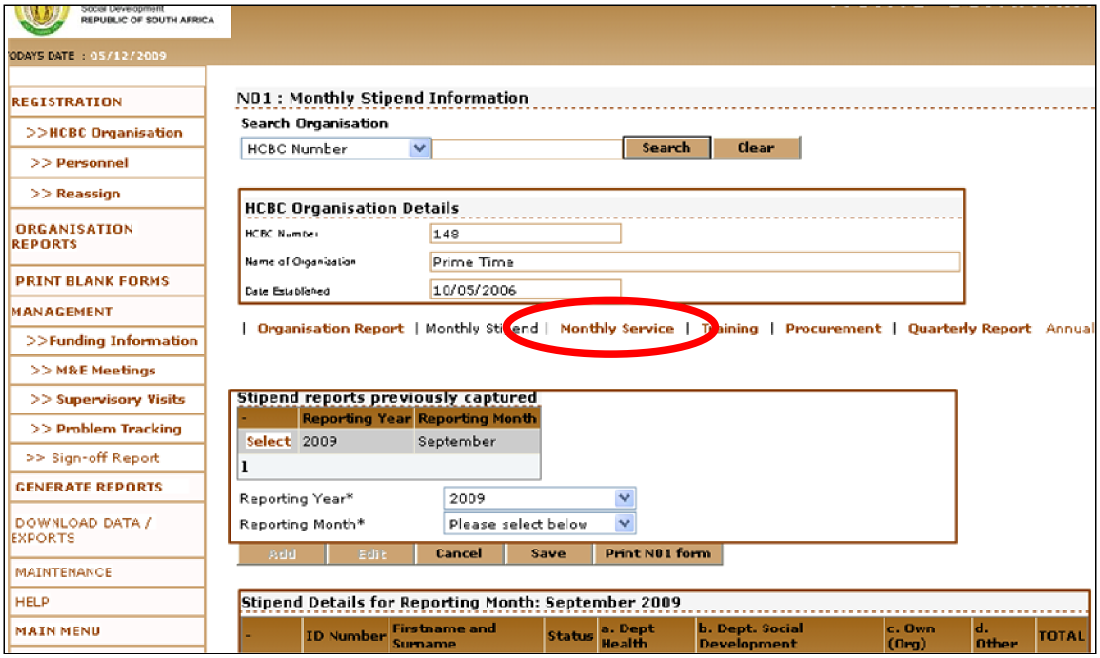
If there are errors in the Monthly Stipend details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

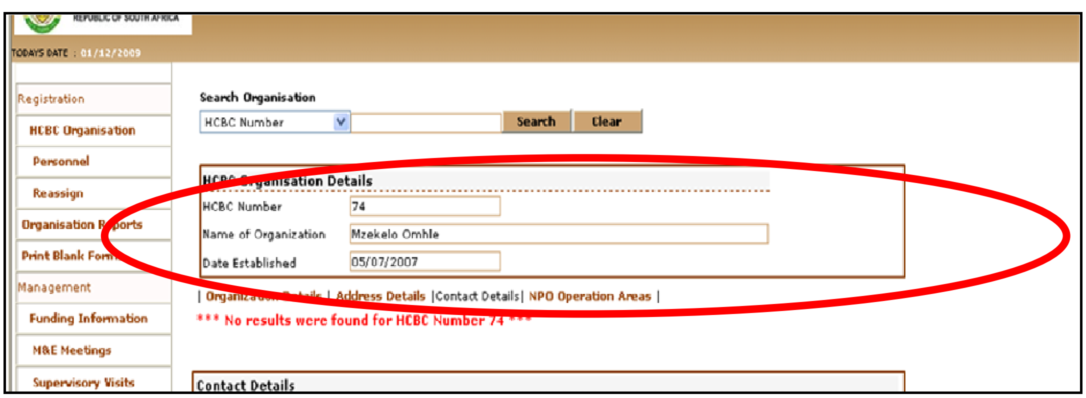
3. Monthly Service

To proceed, the capturing official should click on the text hyperlink "**Monthly Service**", adjacent to "**Monthly Stipend**". "**Monthly Service**" is the second sub menu of the "**Organisation Reports**" main menu button.

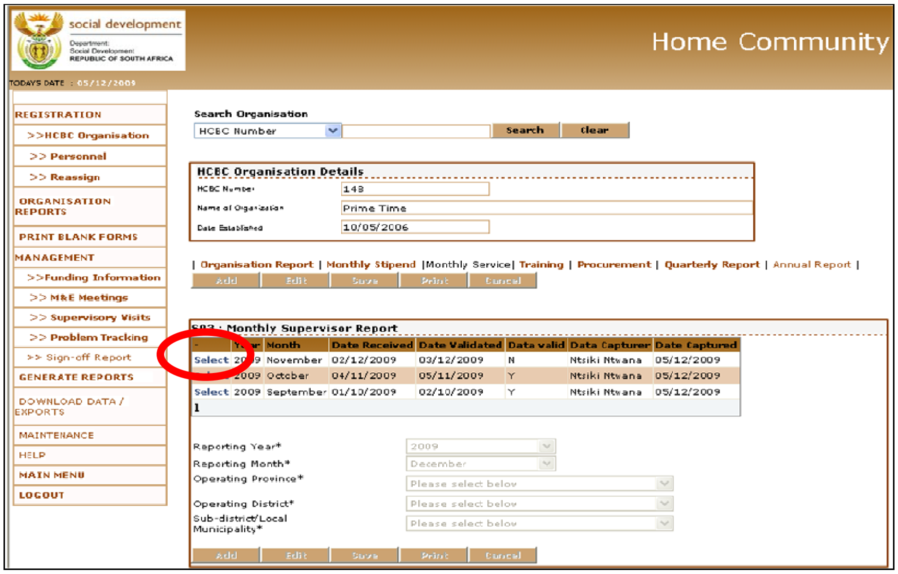
Note: The capturing official can not capture in this page if there is no information captured in the Organisation report page.



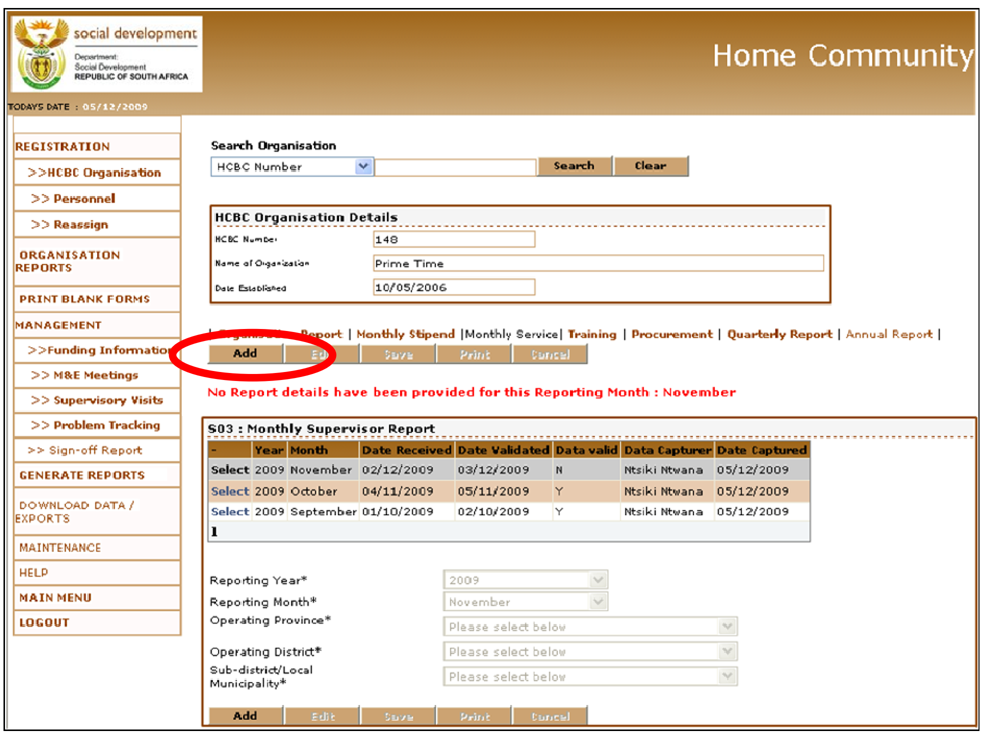
The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



Click the “**Select**” next to the month that needs to be captured or updated



Click “**Add**” to load Monthly Services.



Click in each field to capture the Monthly Services OR use the drop down lists to select the appropriate option.

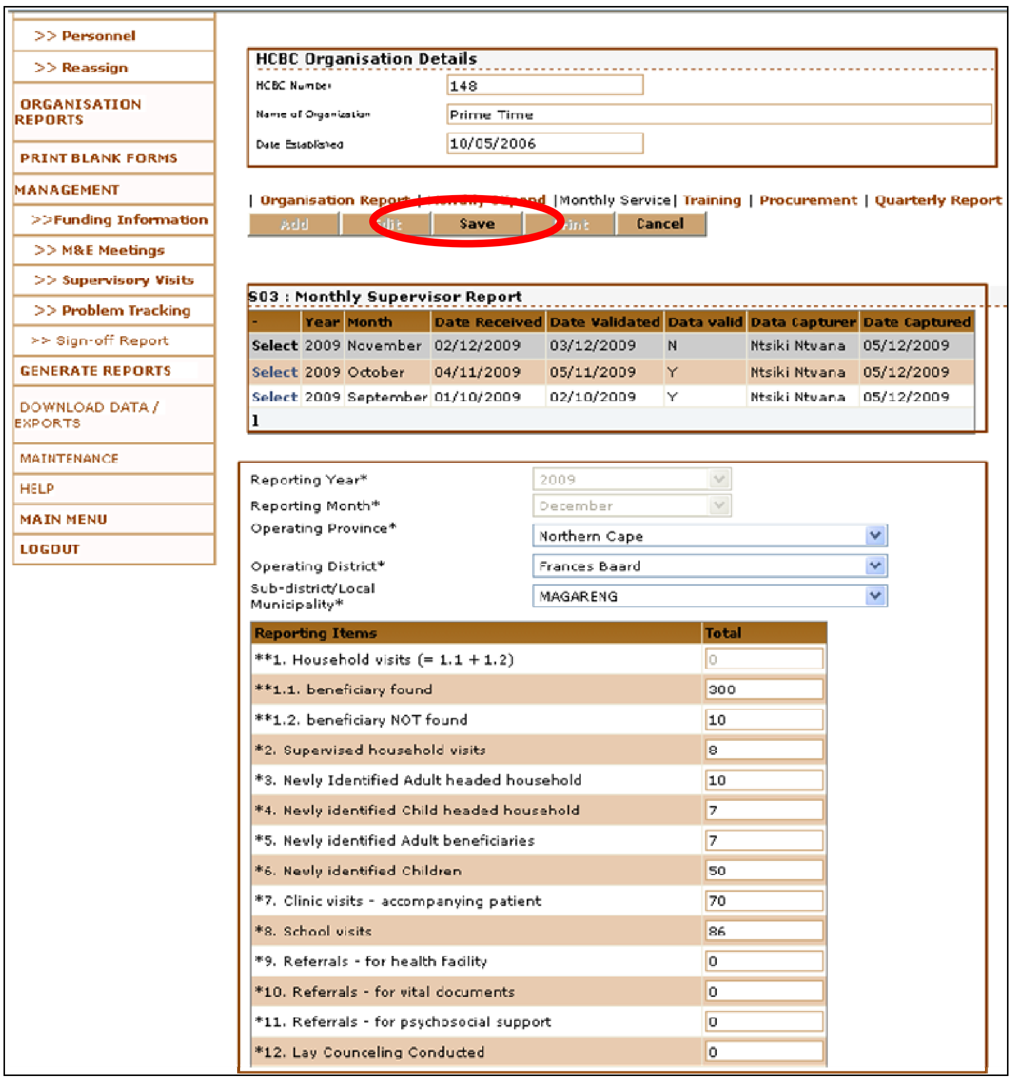
Operating Province

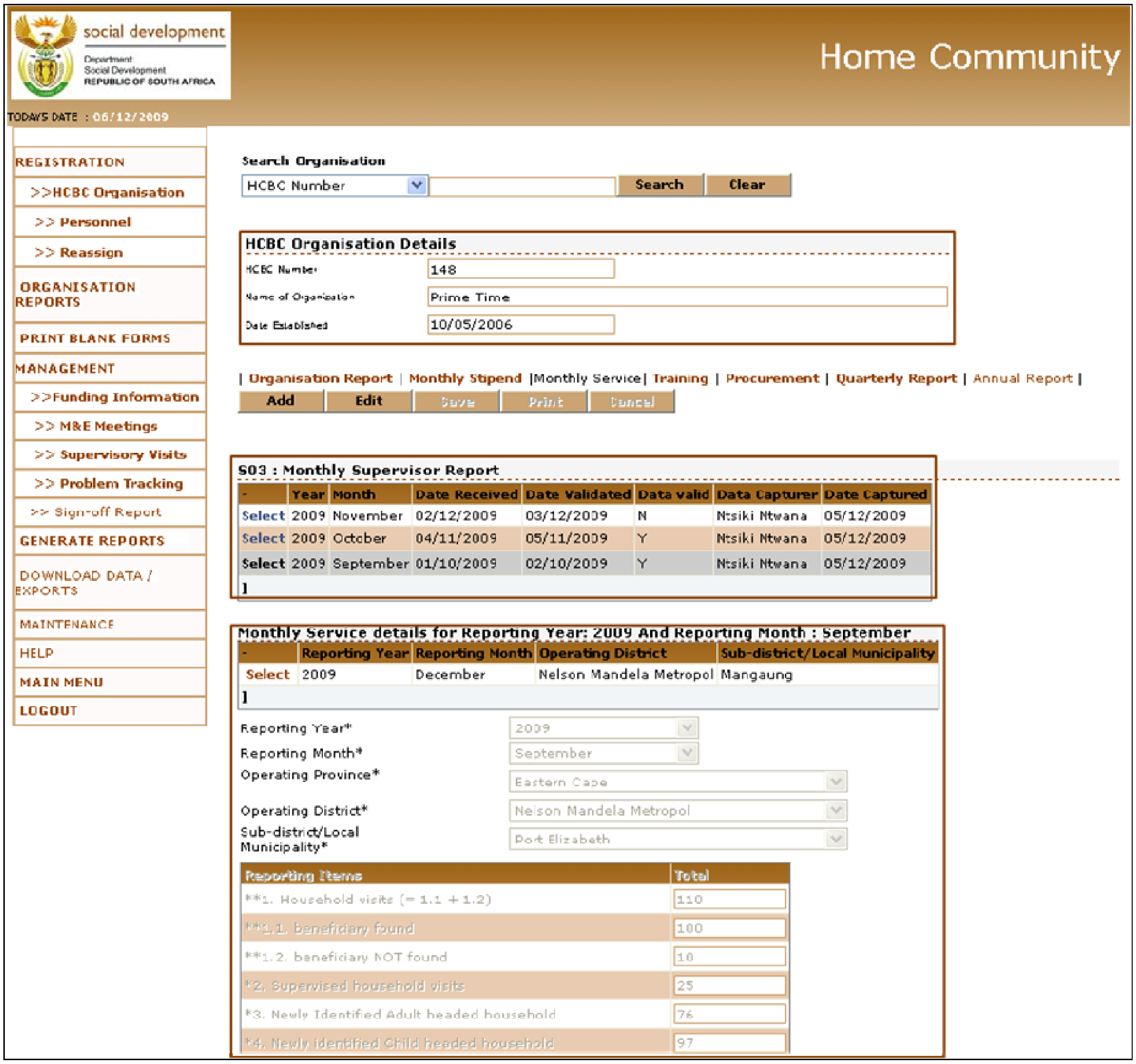
Operating Province

Sub-district/Local Municipality

Reporting Items

Click "**Save**" button





All details for that Monthly Service are saved to the database. The system displays a list of all reports received and captured.

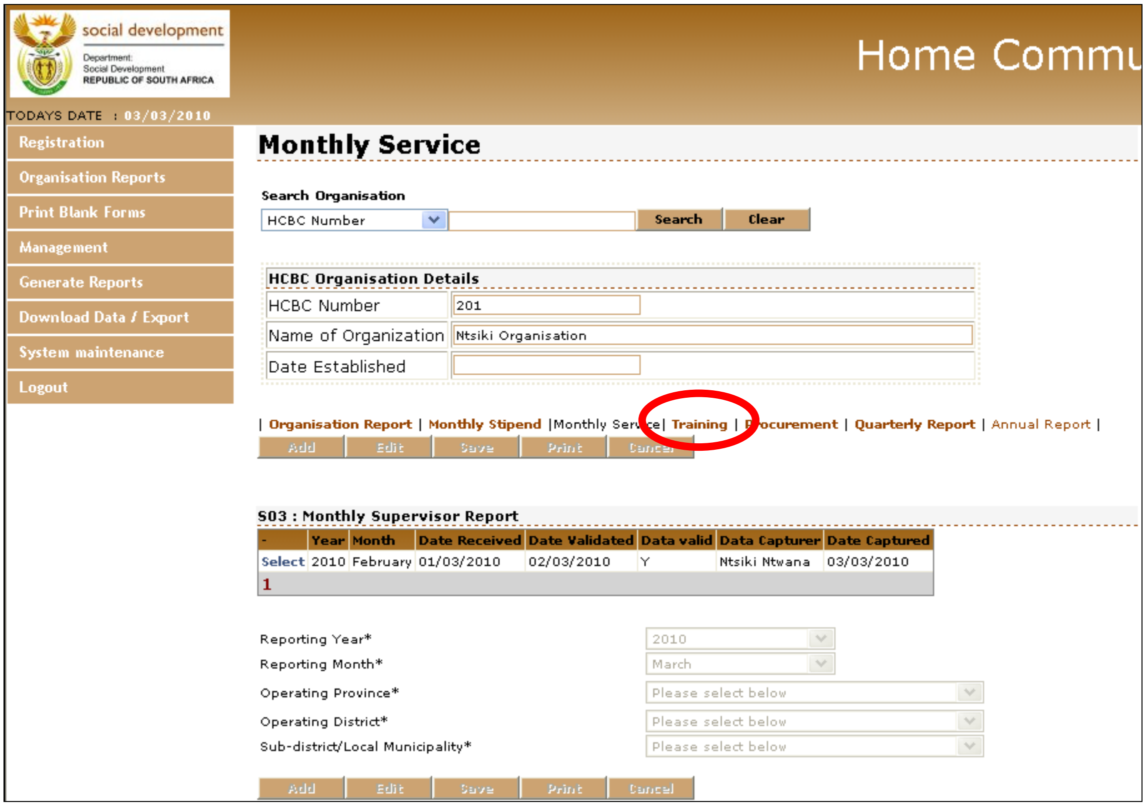
Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

If there are errors in the Monthly Services details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

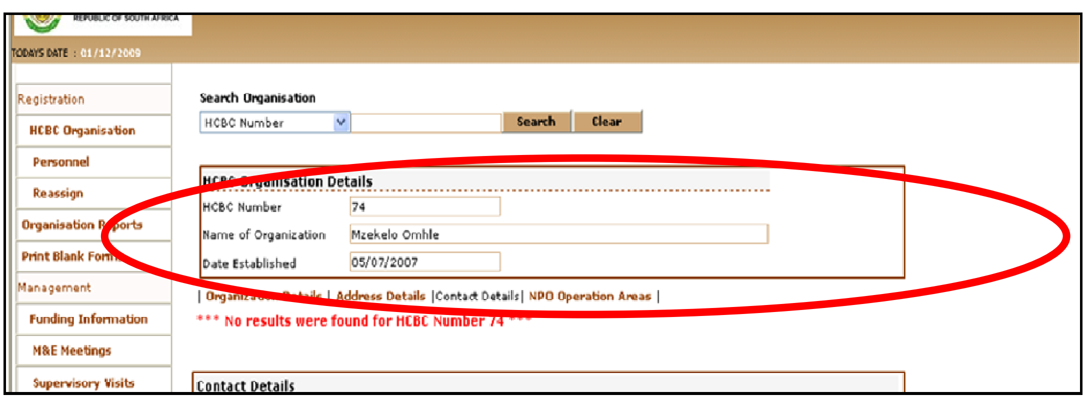
If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

4. Training

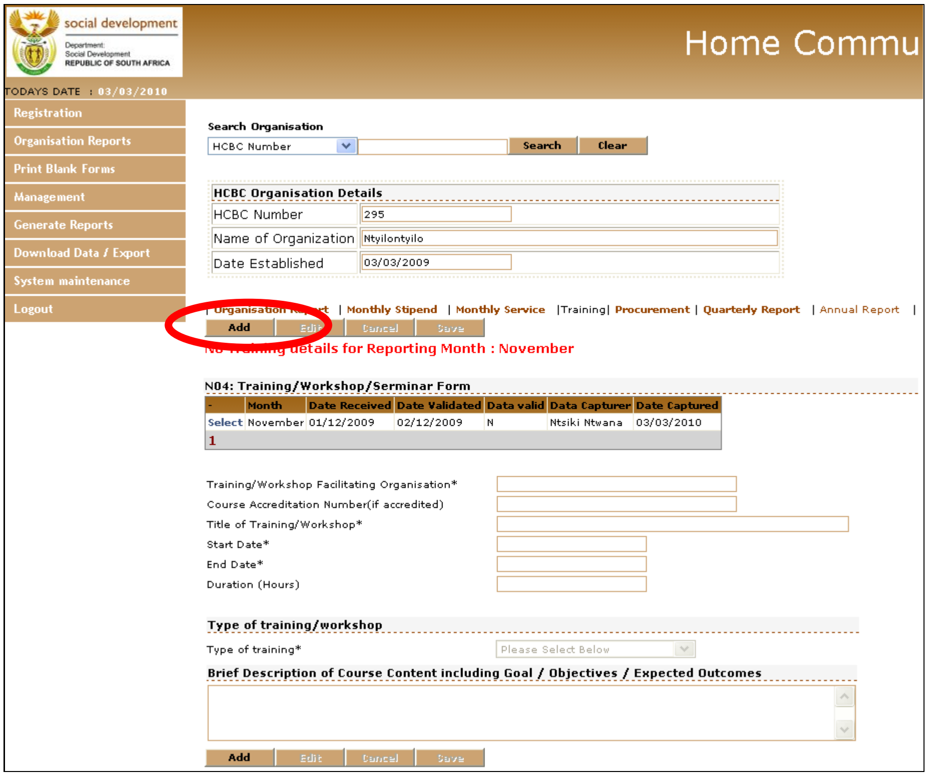
To proceed, the capturing official should click on the text hyperlink "**Training**", adjacent to "**Monthly Service**". "**Training**" is the forth sub menu of the "**Organisation Reports**" menu.



The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



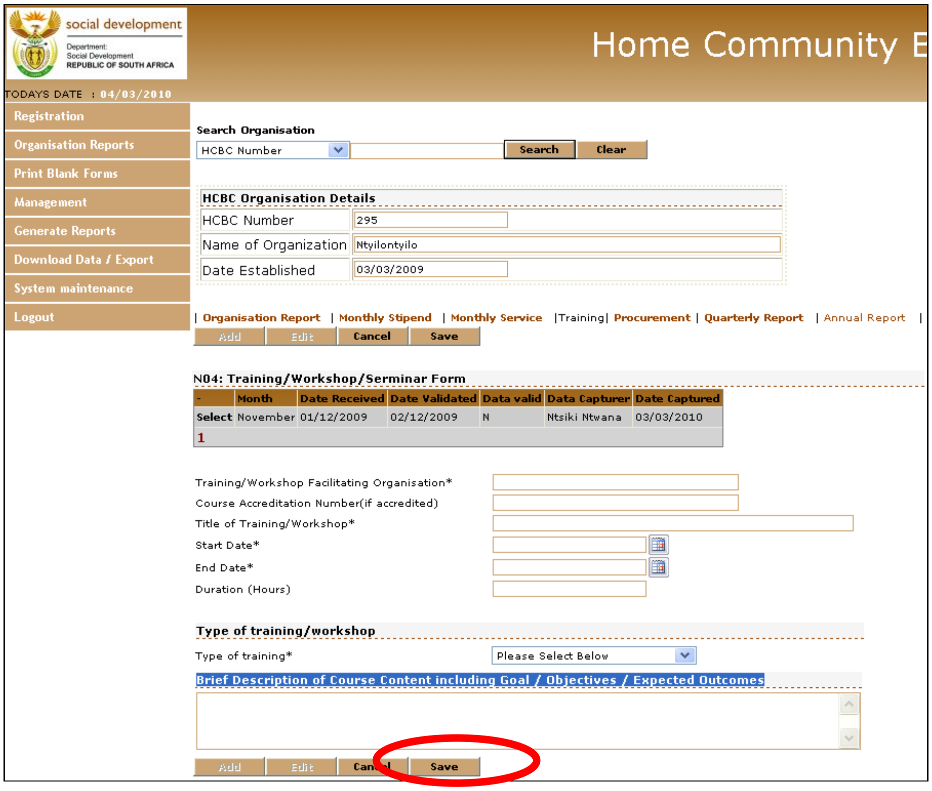
Click "**Add**" to load Training Page.



Click in each field to capture the Training Report OR use the drop down lists to select the appropriate option.

- ***Training/Workshop Facilitating Organisation***
- ***Course Accreditation Number (if accredited)***
- ***Title of Training/Workshop***
- ***Start Date***
- ***End Date***
- ***Duration (Hours)***
- ***Type of training***
- ***Brief Description of Course Content including Goal / Objectives / Expected Outcomes***

Click "**Save**" button



All details for that Training are saved to the database.

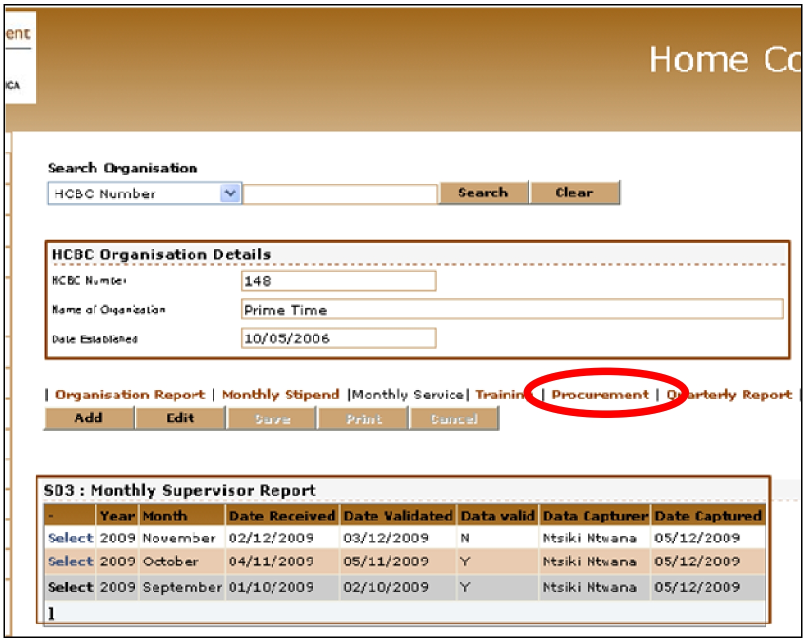
Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

If there are errors in the Training Report details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

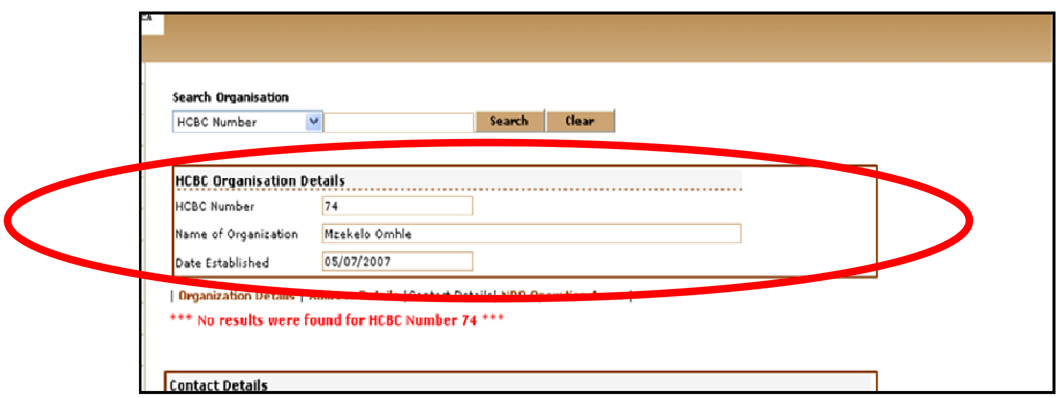
If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

5. Procurement

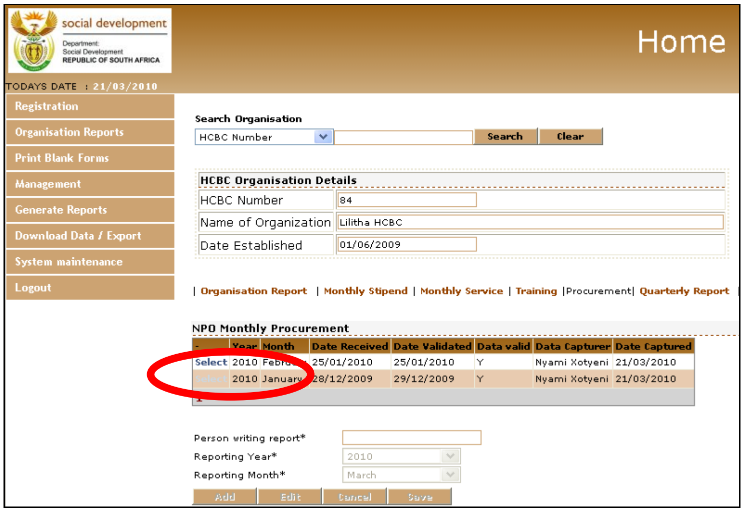
To proceed, the capturing official should click on the text hyperlink "**Procument**", adjacent to "**Training**". "**Procument**" is the fourth sub menu of the "**Organisation Reports**" main menu button.



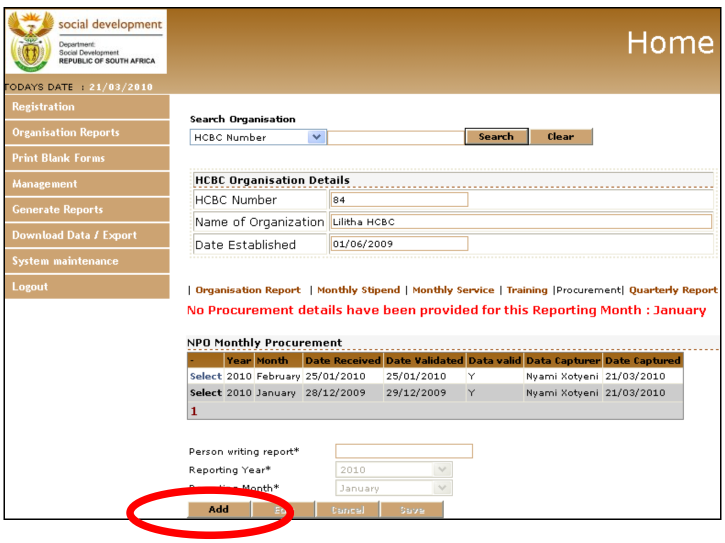
The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



Select the month you want to capture.

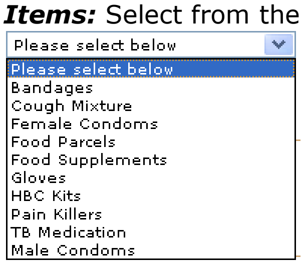


Click “**Add**” to load Procurement Report page.



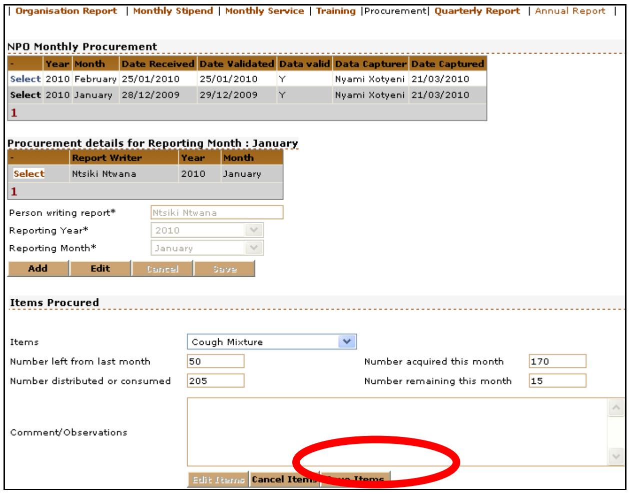
Click in each field to capture the Procurement Report OR use the drop down lists to select the appropriate option.

- ***Items:*** Select from the list

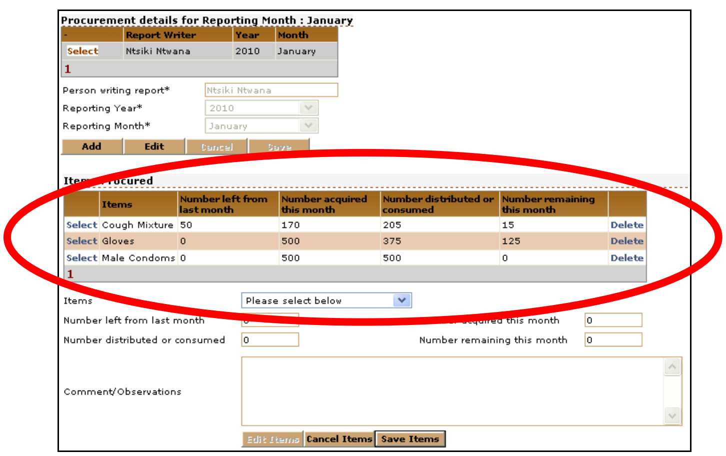


- ***Number left from last month***
- ***Number acquired this month***
- ***Number distributed or consumed***
- ***Number remaining this month***
- ***Comment/Observations***

Click “**Save Items**” button



All Procurement details are saved to the database. The system displays a list of all items.



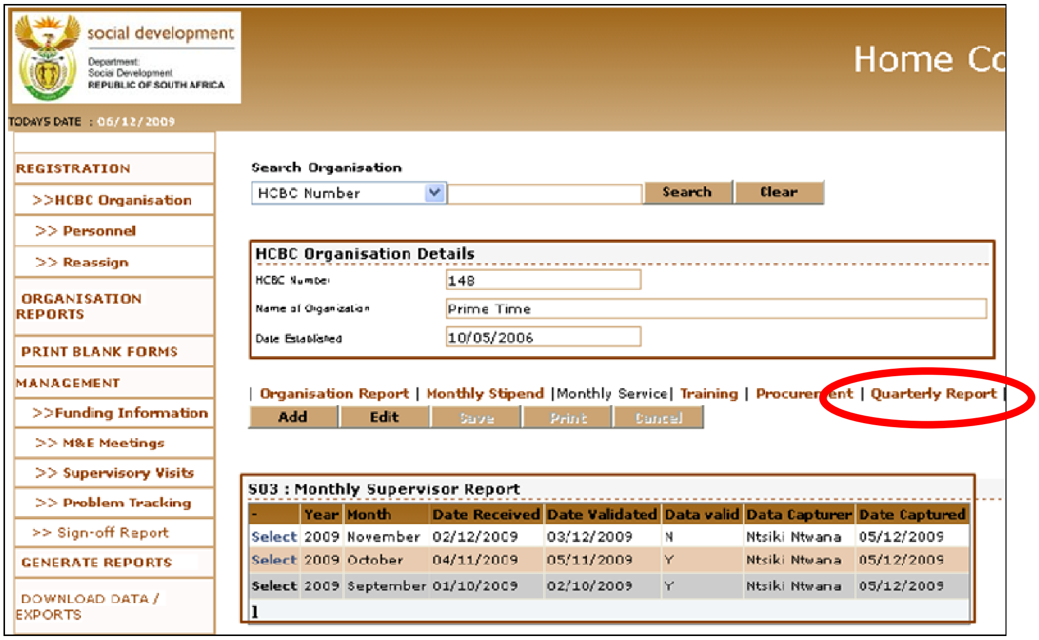
Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click “**Save**” again.

If there are errors in the Procurement Report details OR it is necessary to change them, the capturing official concerned should click on the “**Edit Items**” button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation’s details need to be saved. If the “**Save**” button is not clicked, changes to any field will not be updated in the database. As per the “**Add**” procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

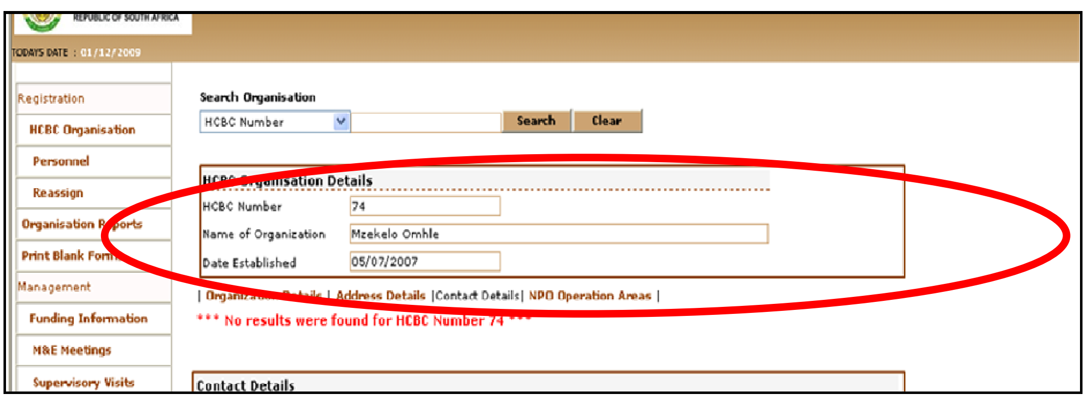
If the Capturer enters incorrect data whilst in “Edit” mode or “Add” mode, click the “Cancel” button. All data will be cleared. The “**Cancel**” button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the “**Cancel**” button.

6. Quarterly Report

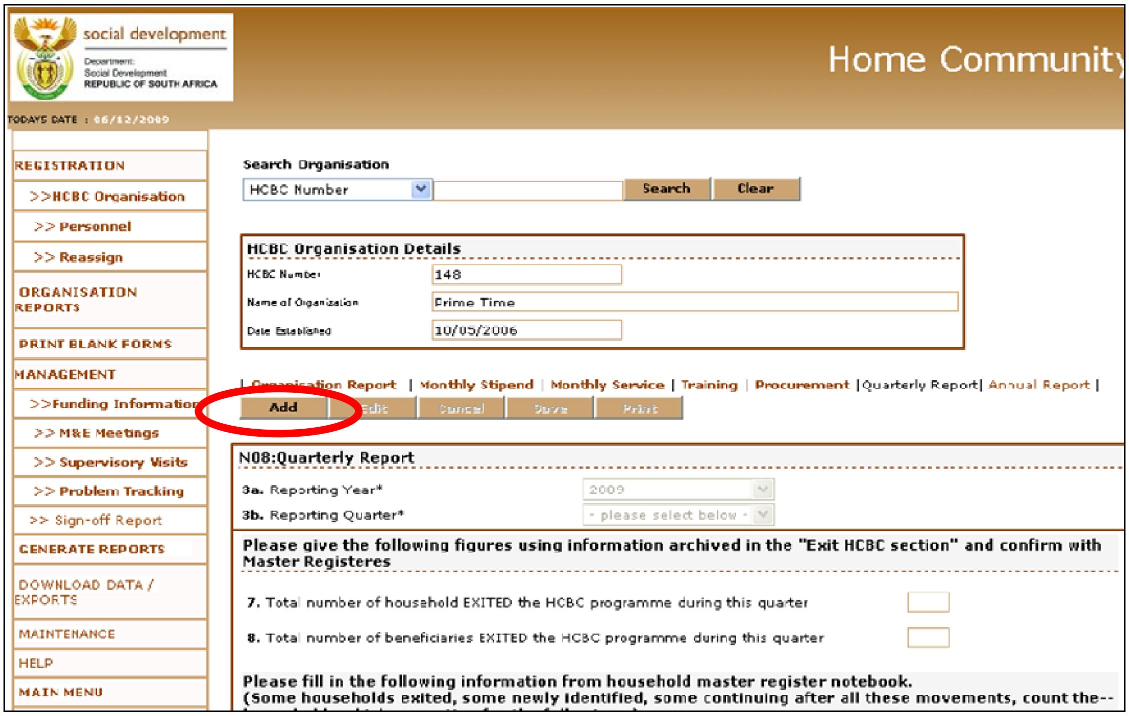
To proceed, the capturing official should click on the text hyperlink "**Quarterly Report**", adjacent to "**Procument**". "**Quarterly Report**" is the second sub menu of the "**Organisation Reports**" main menu button.



The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



Click “**Add**” to load Quarterly Report.



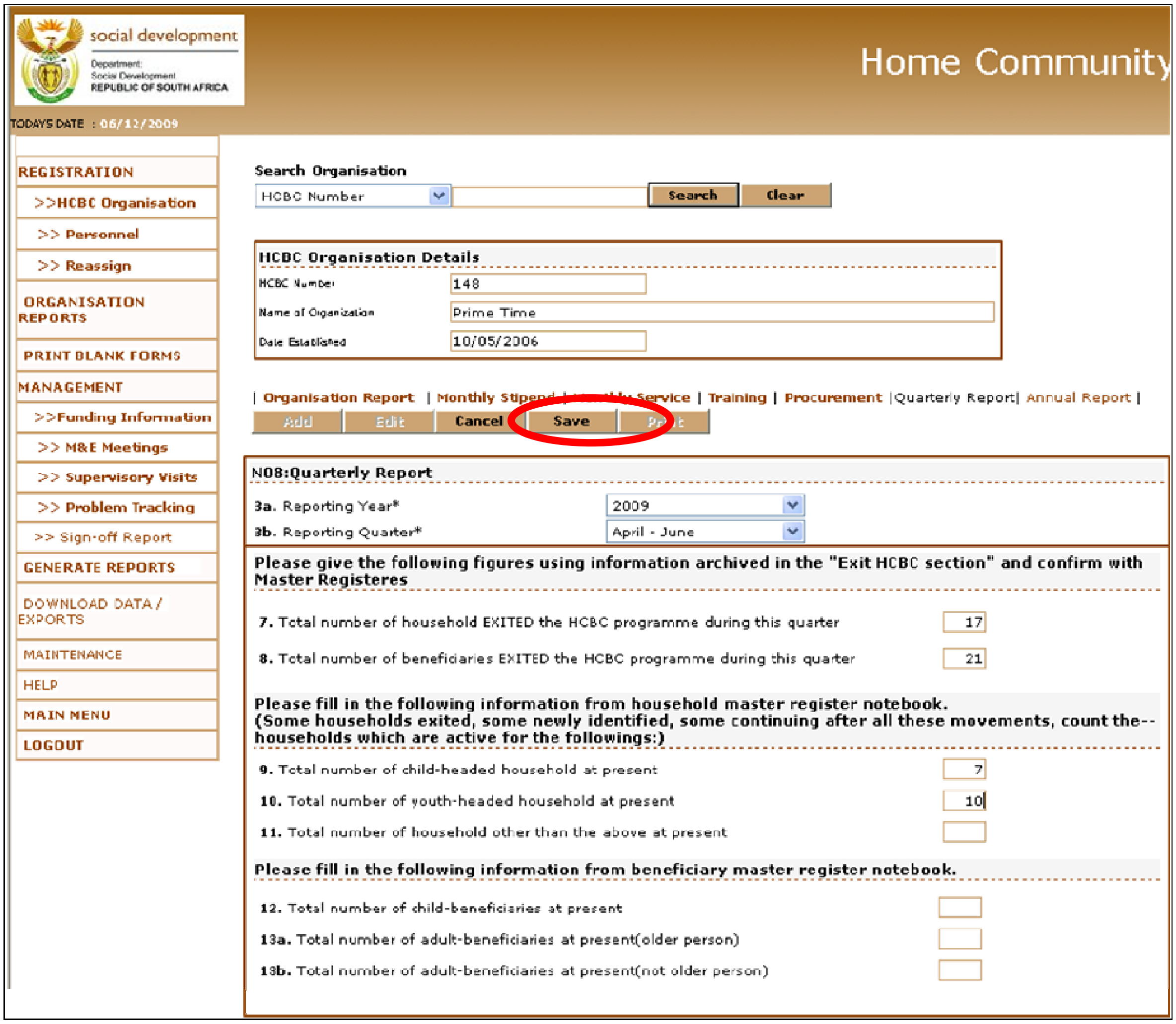
Click in each field to capture the Quarterly Report OR use the drop down lists to select the appropriate option.

Reporting Year

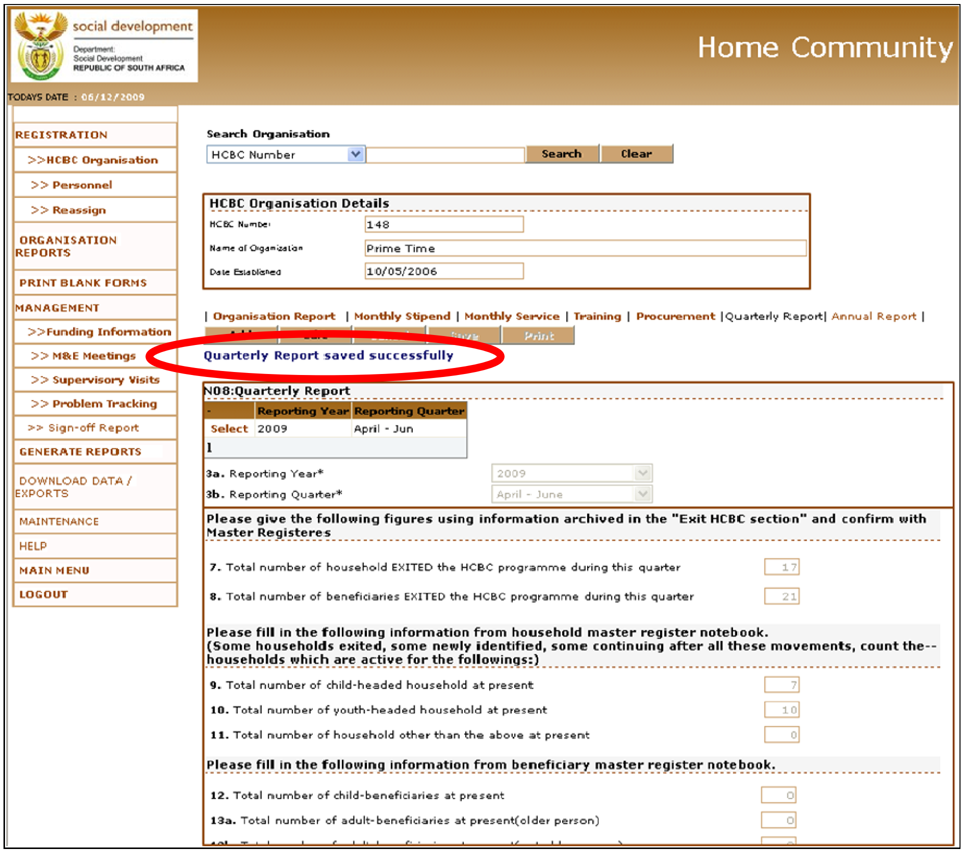
Reporting Quarter

Reporting Information

Click “**Save**” button



All details for that Quarterly Report are saved to the database. The system displays a list of all reports received and captured.



Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

If there are errors in the Quarterly Report details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

Chapter 4: Management

The ***Home Community-Based Care*** requires the capturing official to capture the Management Information.

This is the third option of HCBC main menu with its submenus listed below it.

The major functions of "**Management**" include the following:

1. Capture Funding Information
2. M&E Meeting
3. Supervisory Visit
4. Problem Tracking
5. Sign-off Report

Chapter 4: Management

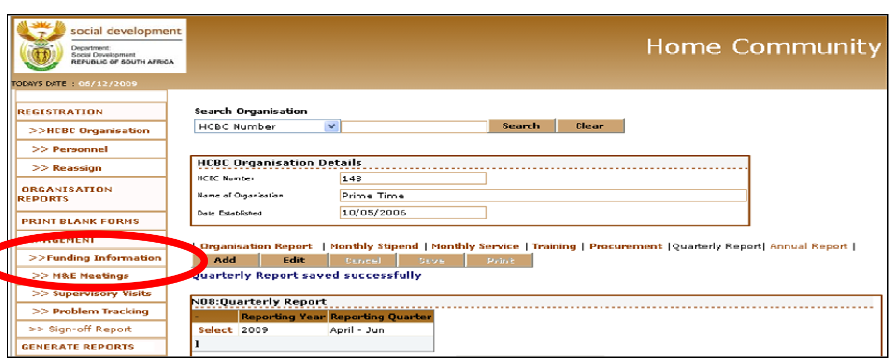
Learning unit 1: Funding Information

Outcomes

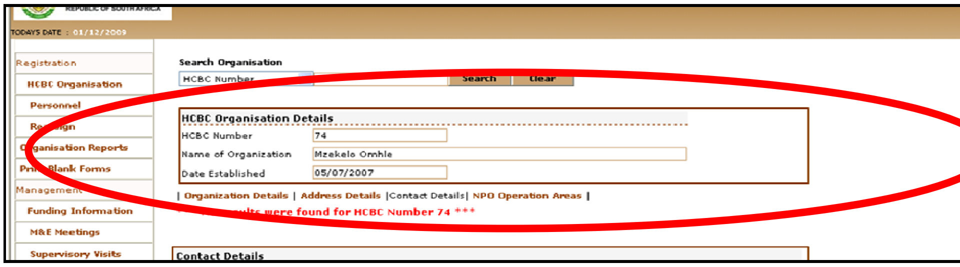
- ✓ Capture information pertaining to funding of an Organisation
- ✓ Amend previously captured funding information
- ✓ Discontinue Funding
- ✓ Record Meeting
- ✓ Record Problem
- ✓ Meeting Report Generation
- ✓ Capture Supervisory Visit Summary

1. Funding Information

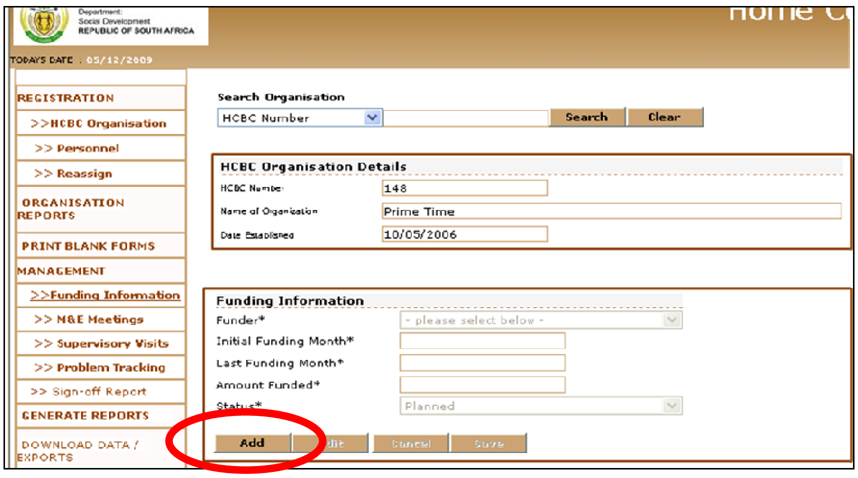
To proceed, the Capturing official should click on the text hyperlink, sub-menu of Management called "**Funding Information**".



The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



Click the "**Add**" button



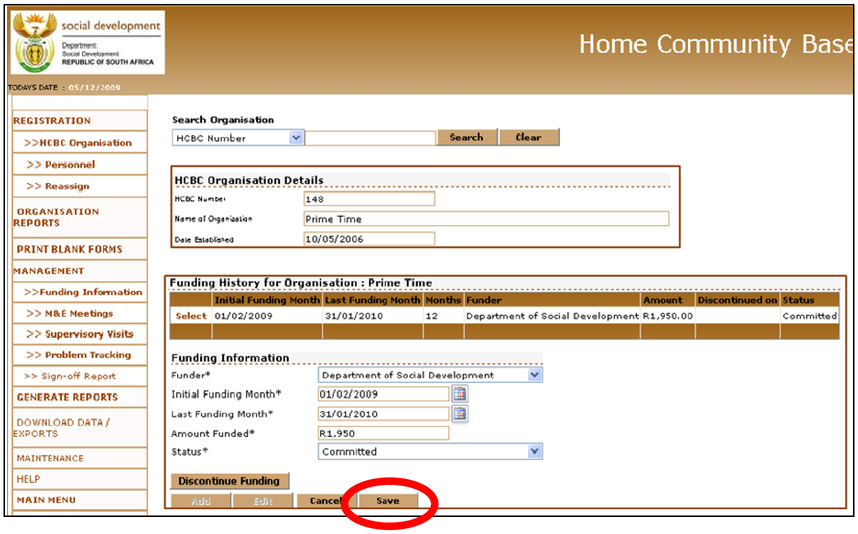
Click in each field to capture the Funding Information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- ***Funder***
- ***Initial Funding Month***
- ***Last Funding Month***
- ***Amount Funded***
- ***Status***

Click the "**Save**" button

Note: Funding can be discontinued



All Funding Report details are saved to the database. The system displays a list of all reports received and captured.

Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

If there are errors in the Funding Report details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

Learning unit 2: M&E Meeting

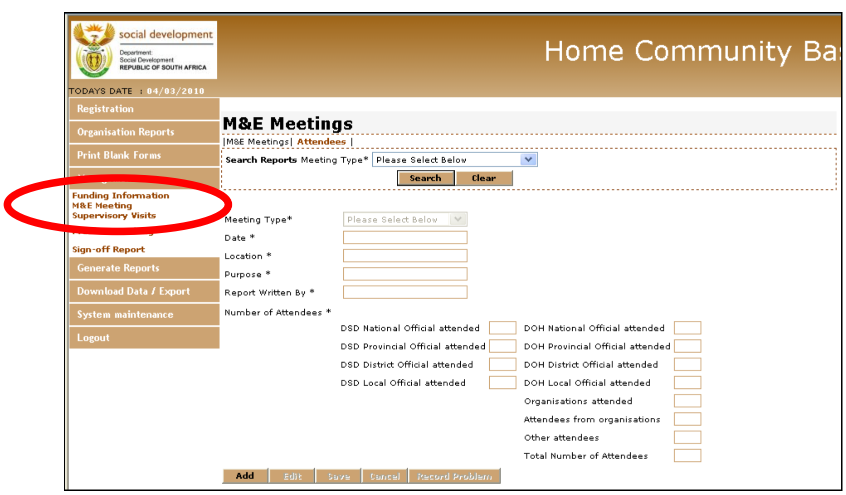
Outcomes

- ✓ Record Meeting
- ✓ Record Problem
- ✓ Record Meeting Attendance

1. M&E Meetings

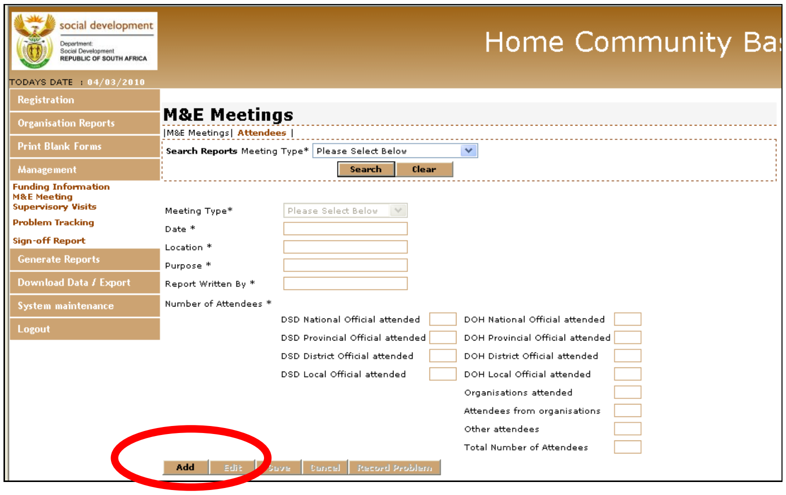
1.1. Record Meeting

To proceed, the Capturing official should click on the text hyperlink, sub-menu of Management called "**M&E Meeting**".



The M&E Meeting screen will load.

Click the "**Add**" button

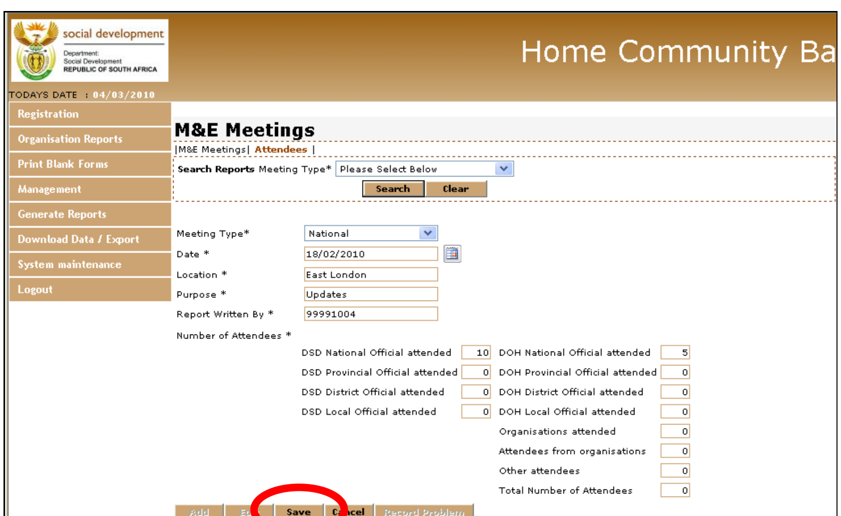


Click in each field to capture the M&E Meeting information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- ***Meeting Type (National, Provincial, District)***
- ***Date***
- ***Location***
- ***Purpose***
- ***Report Written By***
- ***Number of Attendees***

Click the "**Save**" button



All M&E Meeting details are saved to the database.

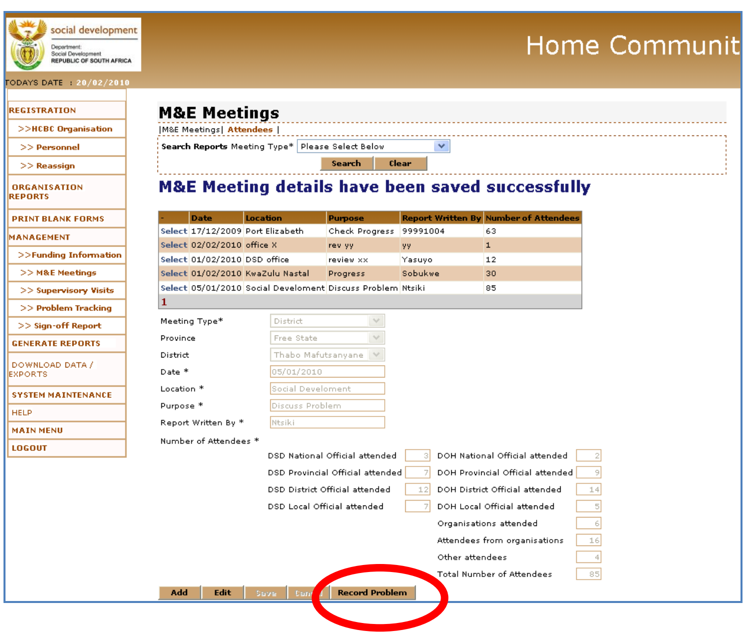
✎ **Note**: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

If there are errors in the M&E Meeting details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

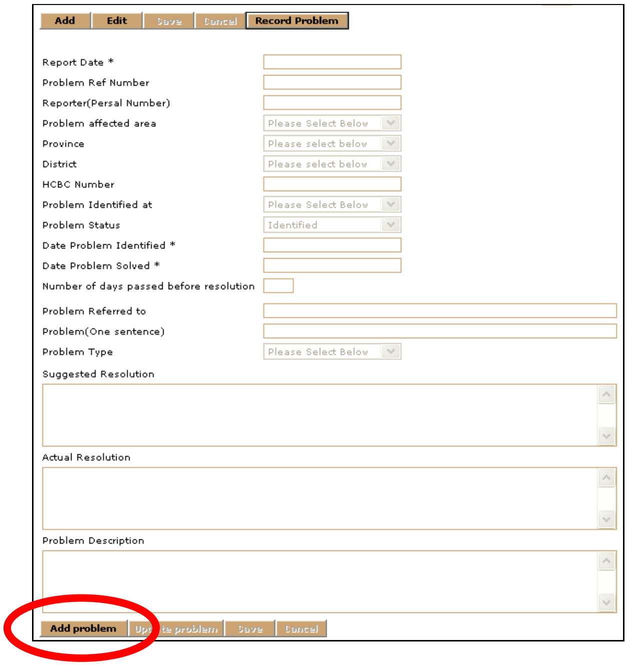
1.2. Record Problem

Once M&E Meeting details are saved you can continue to Record the problem by clicking on the "**Record Problem**" button. Ensure that you select the correct meeting before you continue to the problem page.



The Record Problem screen will load.

Click the "**Add Problem**" button.



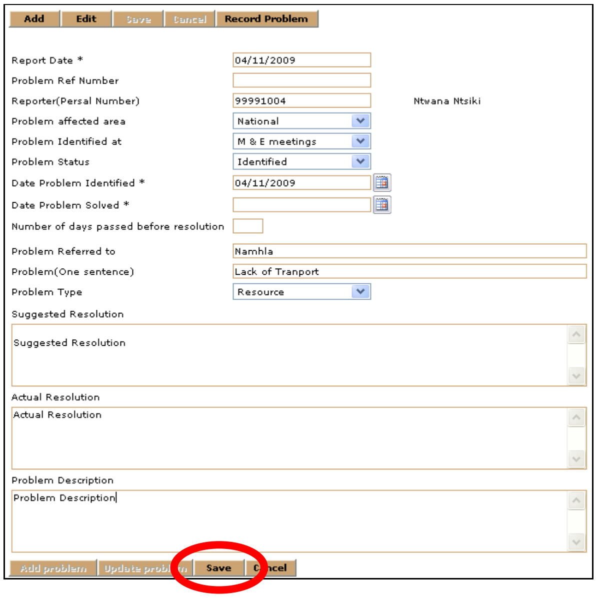
Click in each field to capture the Problem information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- ***Report Date***
- ***Problem Reference No*** (Will be auto generated by the system once the record is saved)
- ***Reporter (Persal Number)***
- ***Problem Affected Area*** (National, Provincial, District)
- ***Report Written By***
- ***Problem Identified at***
- ***Problem Status***
- ***Date Problem Identified***
- ***Date Problem Solved*** (If problem is not yet resolved, this date is not mandatory)
- ***Number of days passed before resolution***
- ***Problem Referred to***
- ***Problem(One sentence)***
- ***Problem Type***
- ***Suggested Resolution***
- ***Actual Resolution***
- ***Problem Description***

Click the "**Save**" button



All Problem details are saved to the database; a Problem reference no is allocated for the problem.

Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

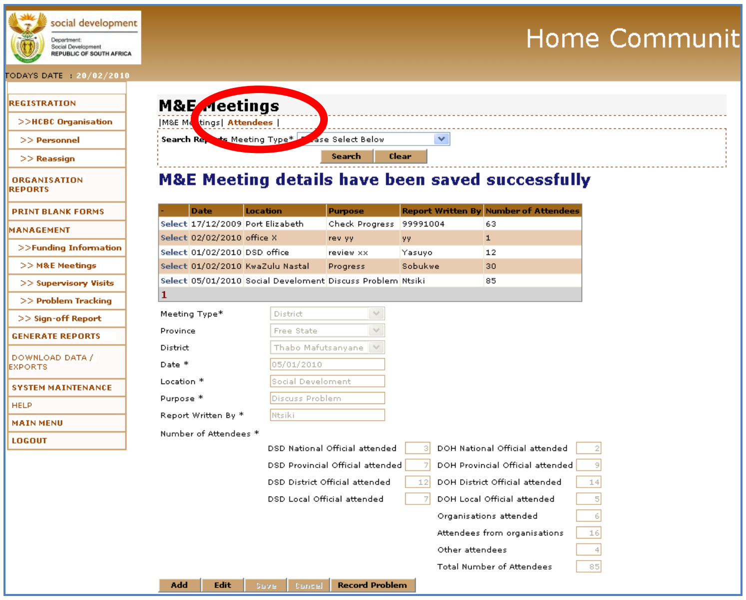
If there are errors in the Problem details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Update Problem" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

Once M&E Meeting details are saved you can continue to Record the problem by clicking on the "**Record Problem**" button. Ensure that you select the correct meeting before you continue to the problem page.

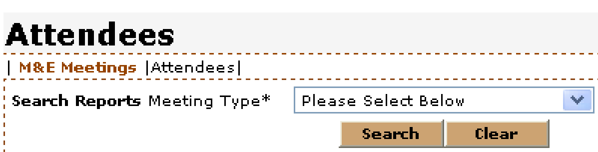
1.3. Record Meeting Attendance

Once M&E Meeting details are saved you can continue to Record meeting attendance by clicking on the "**Attendees**" adjacent to "**M&E Meeting"**.

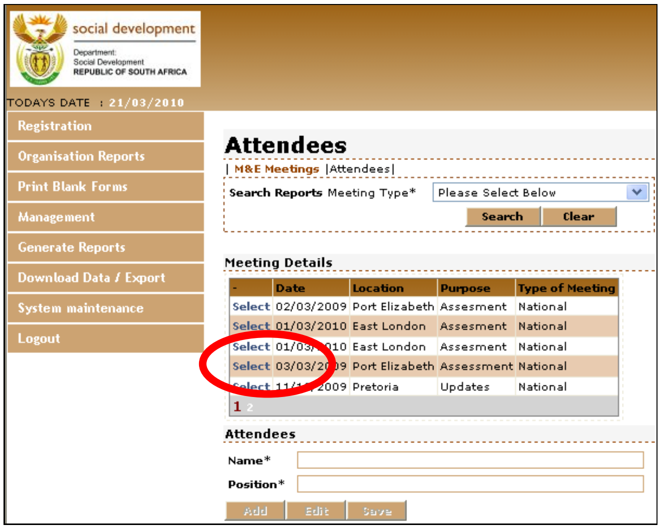


The Attendees screen will load.

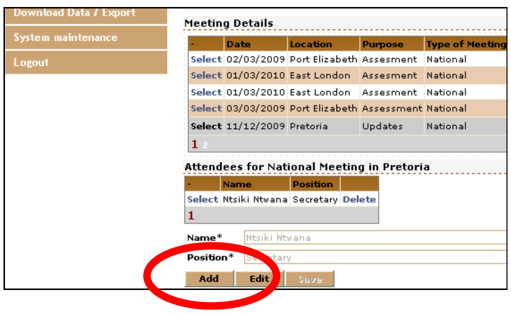
Search for the meeting type.



Select the meeting you want to add attendees for.



Click the "**Add**" button.



Click in each field to capture the Attendance information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- ***Name***
- ***Position***

Click the "**Save**" button

All Attendees details are saved to the database. The system will list all Attendees added.

Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.
If there are errors in the Attendees details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.
If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

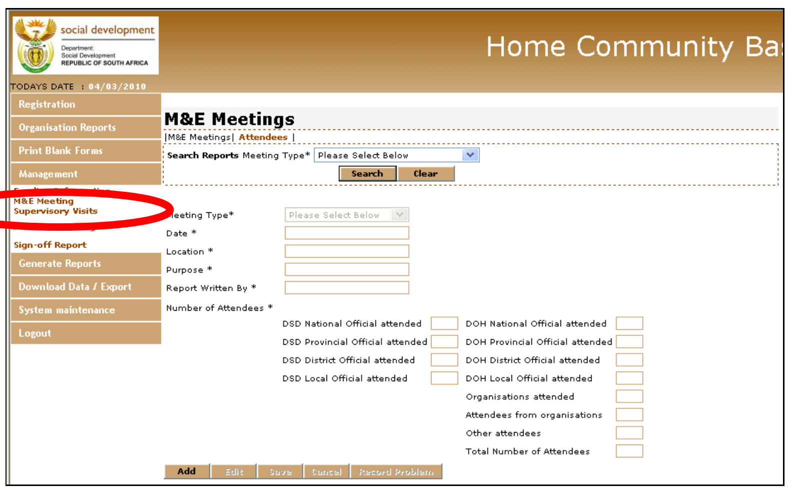
Learning unit 3: Supervisory Visit

Outcomes

- ✓ Record Visit
- ✓ Record Problem

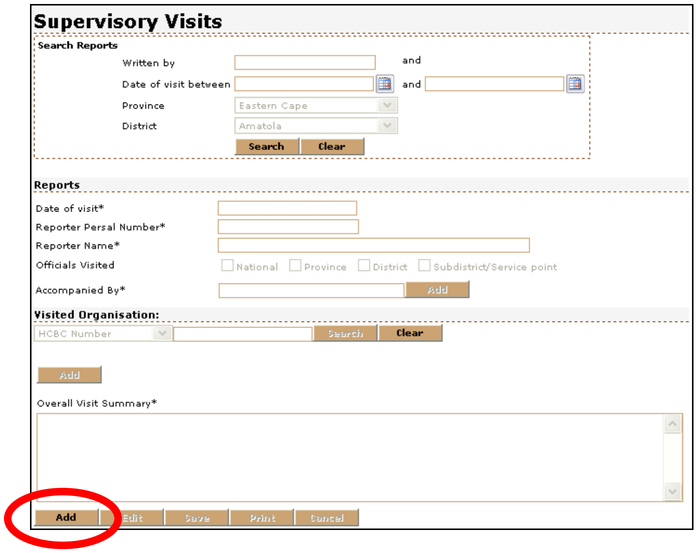
1. Supervisory Visit

To proceed, the Capturing official should click on the text hyperlink, sub-menu of Management called "**Supervisory Visit**".



The Supervisory Visit screen will load.

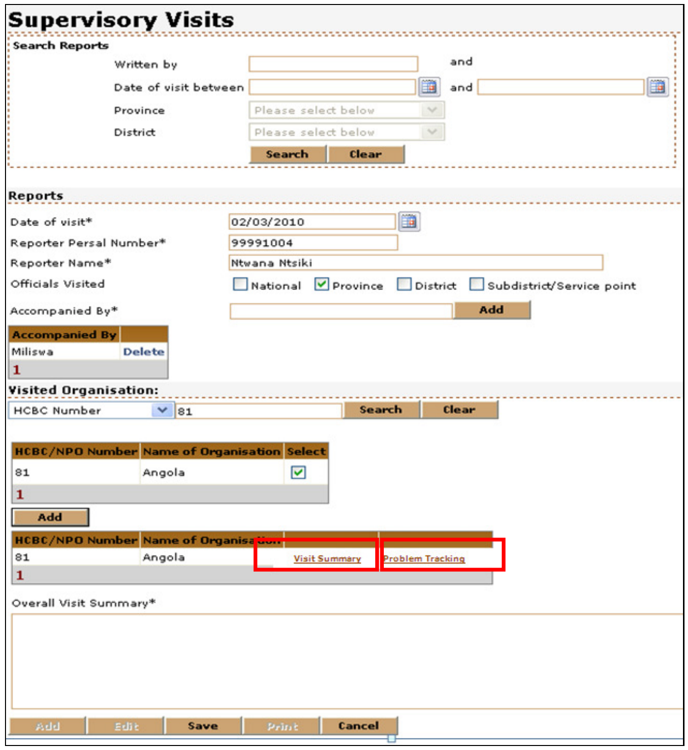
Click the "**Add**" button



Click in each field to capture the Visit information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

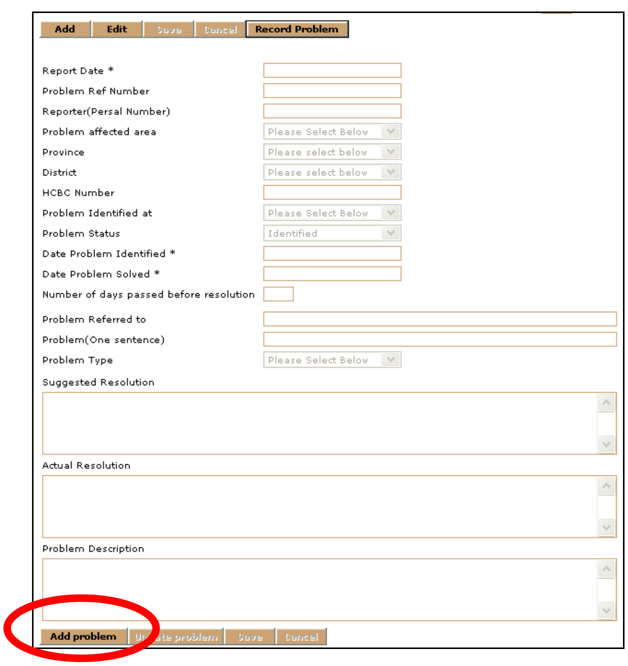
- ***Date of visit***
- ***Reporter (Persal Number)***
- ***Reporter Name:*** Populated from Persal Number
- ***Officials Visited***
- ***Accompanied By***
- ***Visited Organisation*****:** Once all organisations visited are listed,
    - Click on "**Visit Summary**", a box to capture finding for the organisation is displayed.
    - Click on "**Problem Tracking**", the system will open the problem tracking page to capture problems identified in the visit.
- ***Overall Visit Summary***



2. Problem Tracking

To record the Problem, Click on “**Problem Tracking**”.

Click the “**Add Problem**” button.

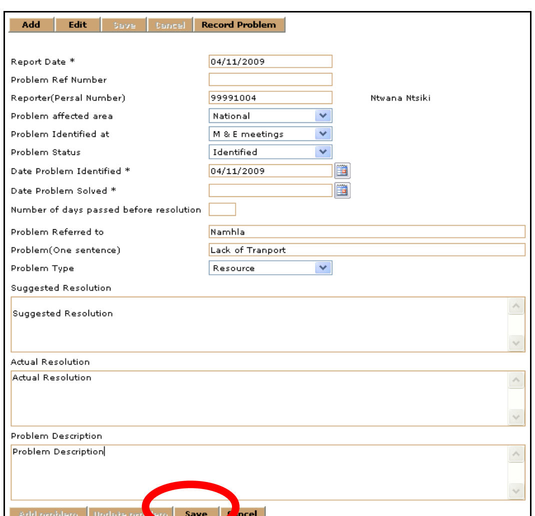


Click in each field to capture the Problem information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- ***Report Date***
- ***Problem Reference No*** (Will be auto generated by the system once the record is saved)
- ***Reporter (Persal Number)***
- ***Problem Affected Area*** (National, Provincial, District)
- ***Report Written By***
- ***Problem Identified at***
- ***Problem Status***
- ***Date Problem Identified***
- ***Date Problem Solved*** (If problem is not yet resolved, this date is not mandatory)
- ***Number of days passed before resolution***
- ***Problem Referred to***
- ***Problem(One sentence)***
- ***Problem Type***
- ***Suggested Resolution***
- ***Actual Resolution***
- ***Problem Description***

Click the "**Save**" button



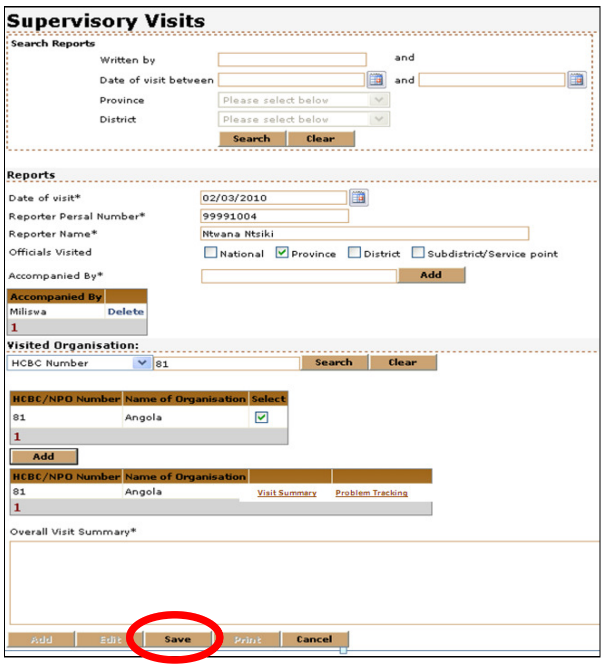
All Problem details are saved to the database; a Problem reference no is allocated for the problem. The system will take you back to the Supervisory Visit Page.

✐ **Note**: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

If there are errors in the Supervisory Visit details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

Click the "**Save**" button.



All Supervisory Visit details are saved to the database.

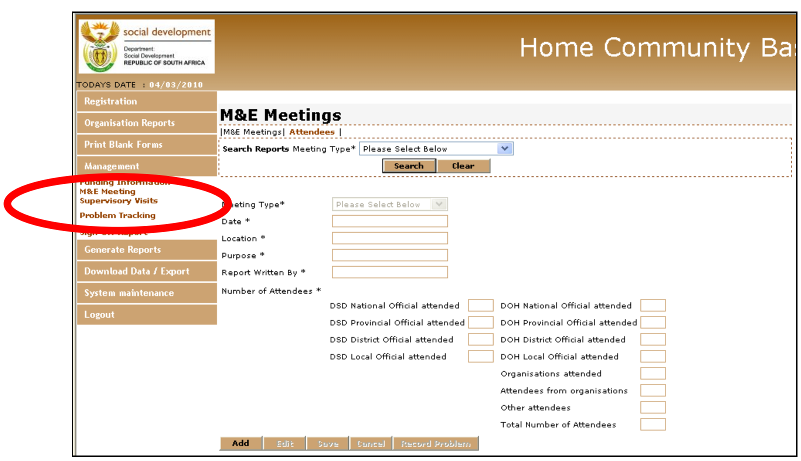
Learning unit 4: Problem Tracking

Outcomes

✓ Track and update Problem

1. Problem Tracking

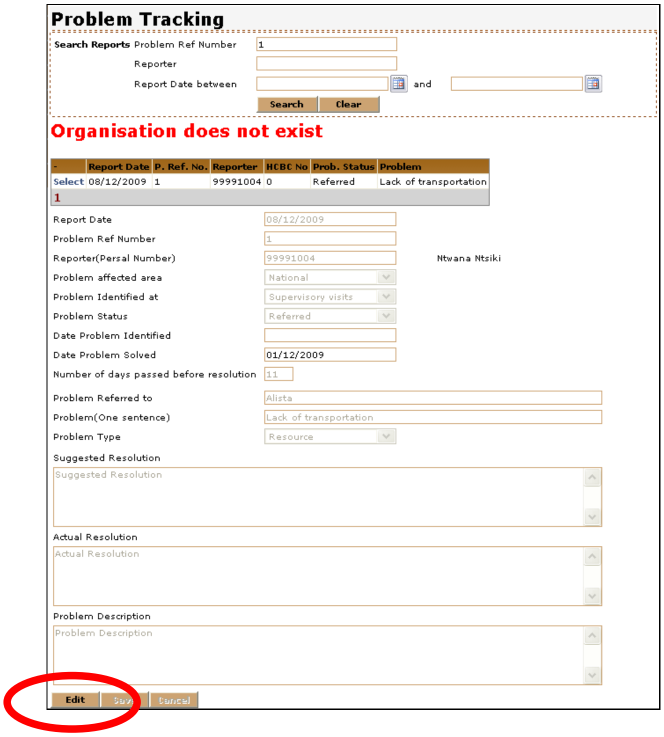
To proceed, the Capturing official should click on the text hyperlink, sub-menu of Management called "**Problem Tracking**".



The Problem Tracking screen will load with Information captured on M&E Meeting page or Supervisory Visit Page will be displayed.

Search by reference no. This was generated on the M&E Meeting page or Supervisory Visit Page.

Click the "**Edit**" button.

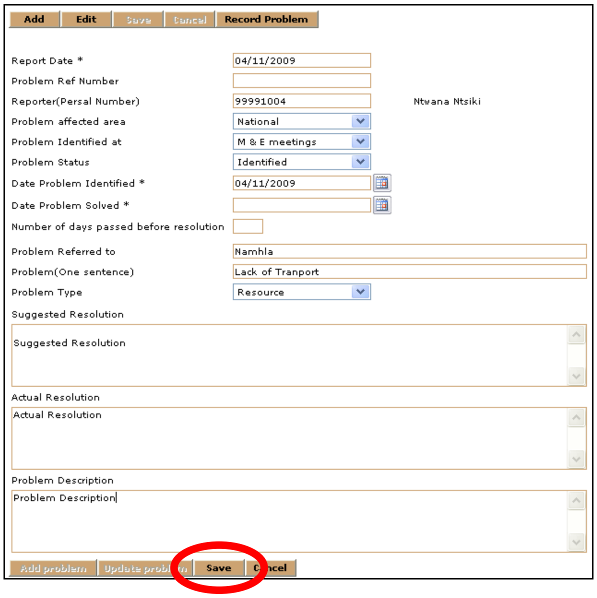


Click in each field to capture the Problem information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- ***Report Date:*** This field can not be amended
- ***Problem Reference No:*** This field can not be amended
- ***Reporter (Persal Number) :*** This field can not be amended
- ***Problem Affected Area:*** you can amend this field if there are changes to be made (National, Provincial, District)
- ***Report Written By:*** This field can not be amended
- ***Problem Identified at:*** This field can not be amended
- ***Problem Status*** you can amend this field if there are changes to be made
- ***Date Problem Identified:*** This field can not be amended
- ***Date Problem Solved*** (If problem is not yet resolved, this date is not mandatory)
- ***Number of days passed before resolution:*** this field is calculated by the system once "***Date Problem Solved***" is captured.
- ***Problem Referred to*** you can amend this field if there are changes to be made
- ***Problem(One sentence) :*** This field can not be amended
- ***Problem Type:*** This field can not be amended
- ***Suggested Resolution*** you can amend this field if there are changes to be made
- ***Actual Resolution*** you can amend this field if there are changes to be made
- ***Problem Description:*** This field can not be amended

Click the "**Save**" button



All Problem details are saved to the database; a Problem reference no is allocated for the problem.

Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.

If there are errors in the Problem details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in **"Update Problem"** ***mode or "Add" mode, click the "Cancel" button.*** All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

Learning unit 5: Sign-off Report

Outcomes

- ✓ Capture Report
- ✓ View report Status
- ✓ Print Sign-off Report

1. Sign-off Report

Note: Only Co-ordinators from both Department of Health and Department of Social Development will capture Sign-off report details.

Department of Social Development Co-ordinator has access to capture only on the "**DSD specific section"** and **"General Section"**. They will not be able to capture on the "**DoH specific section"**, but will be able to view this section.

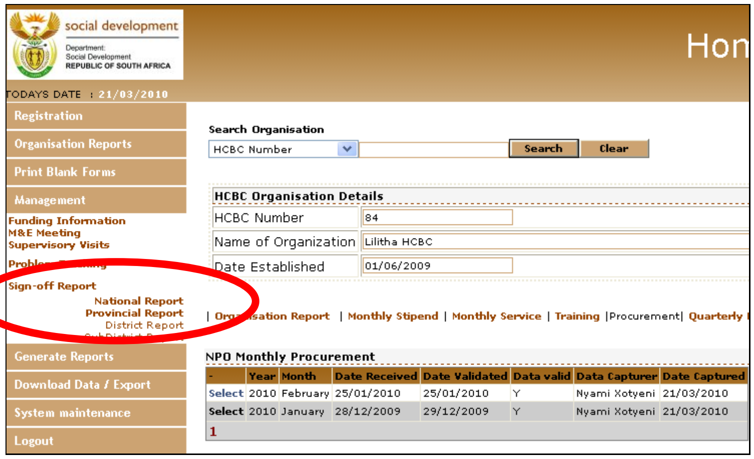
Department of Health Co-ordinator has access to capture only on the "**DoH specific section"** and **"General Section**". They will not be able to capture on the "**DSD specific section**", but will be able to view this section.

Values for outsourced / outcome indicators will only be entered if it an Annual Report being captured

Once both officials are in agreement that the information captured is correct and they have confirmed all sections on the system, the report will be submitted.

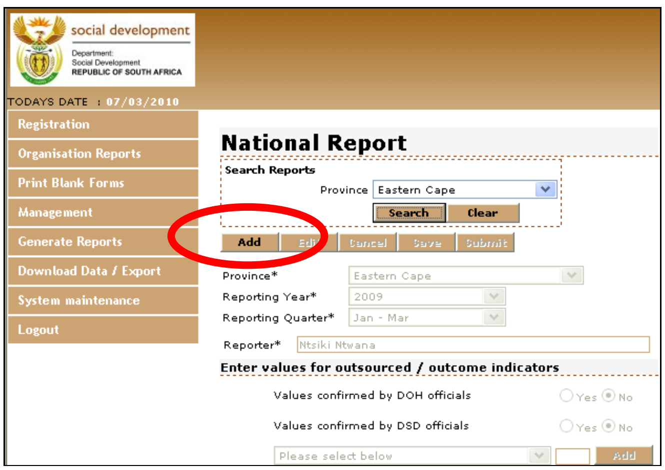
To proceed, the Capturing official should click on the text hyperlink, sub-menu of Management called "**Sign-off Report**". Click on the report type you will capture.

Note: The system will only allow the logged in person to capture only in their level, but will be able to view other levels. E.g. if report type selected is National only national official will have access to capture.

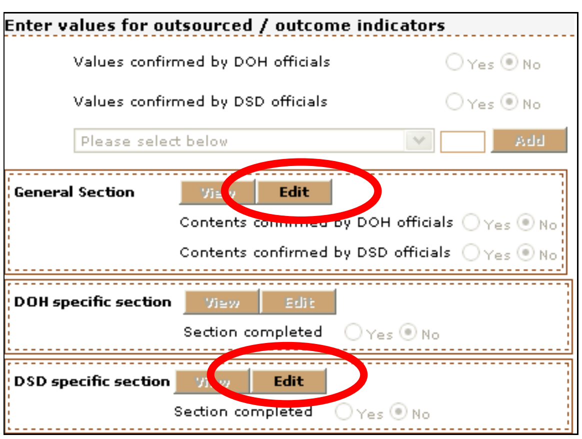


The Sign-off report screen will load.

Click the "**Add**" button



Click on "**Edit**" in the your section.

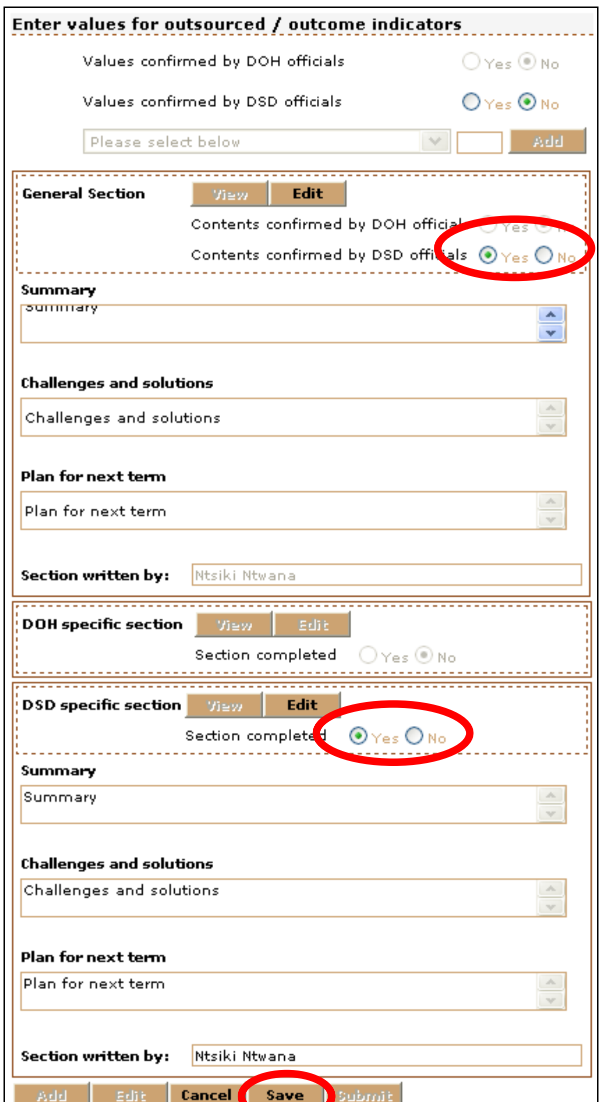


Click in each field to capture the Sign-off information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.
Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- ***Summary***
- ***Challenges and solutions***
- ***Plan for next term***
- ***Contents confirmed by DSD officials:*** Click ***"Yes"*** if in agreement with the content of the report. On the "**General Section**".
- ***Section Completed:*** Click ***"Yes"*** if in the section is completed. On the "**DSD specific section"**.

Click the "**Save**" button.



All Sign-off report details are saved to the database.

Note: ***If there is one or more required field not completed,*** the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "**Save**" again.
If there are errors in the Sign-off report details OR it is necessary to change them, the capturing official concerned should click on the "**Edit**" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made need to be saved. If the "**Save**" button is not clicked, changes to any field will not be updated in the database. As per the "**Add**" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.
If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "**Cancel**" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "**Cancel**" button.

Once Sign-off report details are confirmed complete and are saved, a report can be submitted by clicking on the "**Submit**" button.

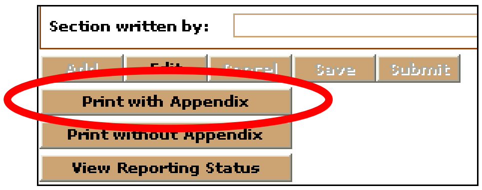
Note: No changes can be done for the sign-off once it has been submitted.

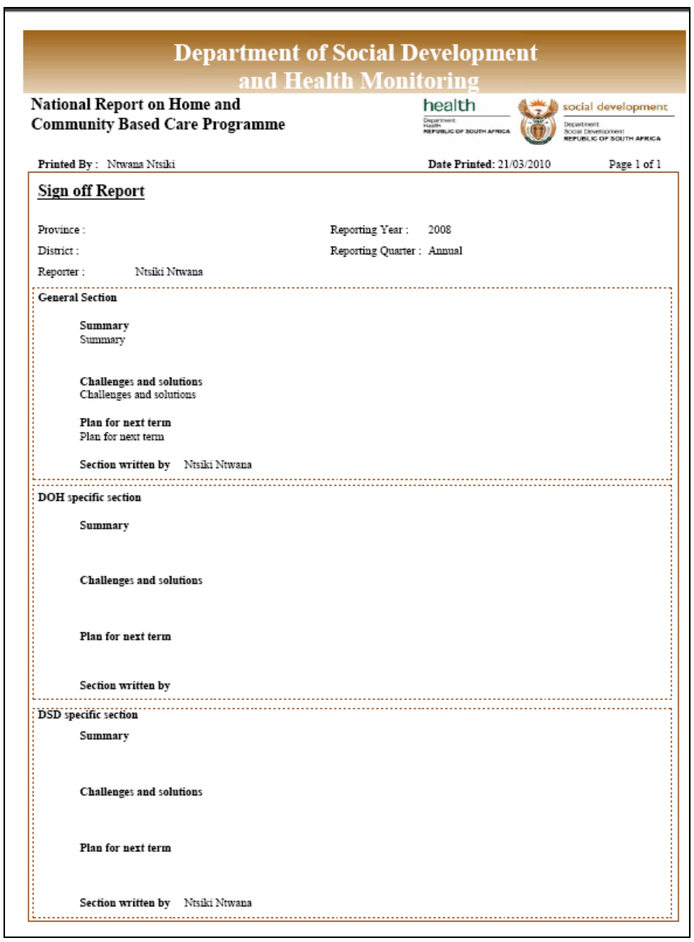
1.1 Printing Sign-off report

Once Sign-off report for that quarter or for that year has been saved, a report can be printed. There are two ways the sign-of report can be printed. (With Appendix and without Appendix)

1.1.1 Print with Appendix

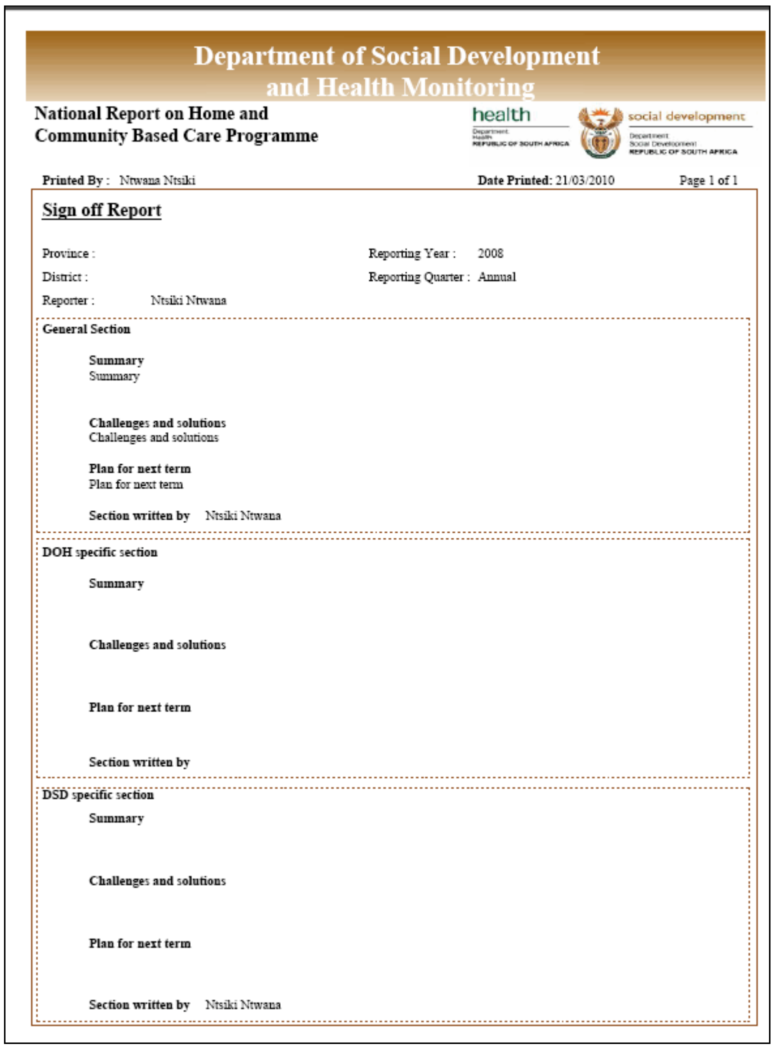
Click on "**Print with Appendix**" button. A Sign-off report will be printed with Monthly Report; Quarterly Report, Registration report and (Outsourced Data - if Annual report)





1.1.2 Print without Appendix

Click on "Print without Appendix" button.



Department of Social Development and Health Monitoring

National Report on Home and Community Based Care Programme

Printed By : Ntwana Ntsiki   Date Printed: 21/03/2010   Page 1 of 1

Sign off Report

Province :   Reporting Year : 2008
District :   Reporting Quarter : Annual
Reporter : Ntsiki Ntwana

General Section

Summary
Summary

Challenges and solutions
Challenges and solutions

Plan for next term
Plan for next term

Section written by Ntsiki Ntwana

DOH specific section

Summary

Challenges and solutions

Plan for next term

Section written by

DSD specific section

Summary

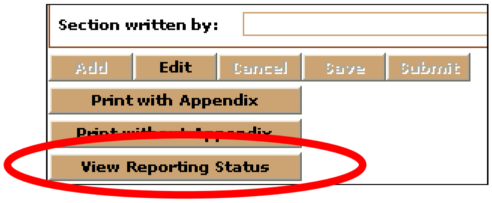
Challenges and solutions

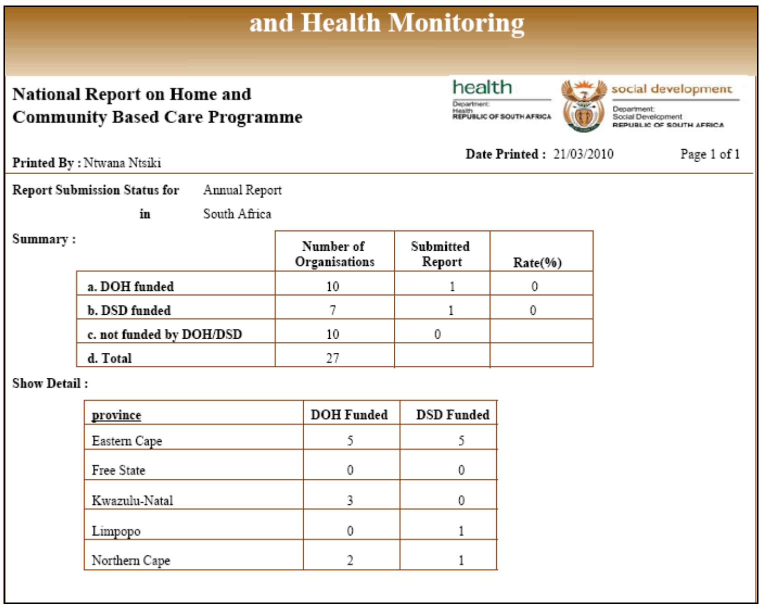
Plan for next term

Section written by Ntsiki Ntwana

1.2 View Reporting Status

Before the coordinators submit the report, they can veiw the status of reporting to be able to check the percentage of organisation report submissions.





and Health Monitoring

National Report on Home and Community Based Care Programme

health
social development

Printed By : Ntwana Ntsiki

Date Printed : 21/03/2010

Page 1 of 1

Report Submission Status for Annual Report
in South Africa

Summary :

	Number of Organisations	Submitted Report	Rate(%)
a. DOH funded	10	1	0
b. DSD funded	7	1	0
c. not funded by DOH/DSD	10	0	
d. Total	27		

Show Detail :

province	DOH Funded	DSD Funded
Eastern Cape	5	5
Free State	0	0
Kwazulu-Natal	3	0
Limpopo	0	1
Northern Cape	2	1

Table 2 - Emergency Instructions

Lost Password

1. If a Capturer forgets his or her password, a call should be logged immediately so that the Capturer password can be re-set. All calls must be logged through SITA Helpdesk, for immediate attention with logged SDIMS related problems call SDIMS Support centre, quote the SITA Helpdesk reference no.
2. **Note**: on the top right hand side of the screen there's a SITA Helpdesk number to log calls. When a SDIMS related problem is logged, an official (with a reference no for the logged call ready) must call the SDIMS support centre at 043 700 8415 / 043 700 8434 / 043 700 8483 / 043 700 8445 for the call to be attended as soon as possible.

3. A Capturer shall under no circumstances "borrow" a Username and password combination from another Capturer, with or without his or her consent or knowledge.

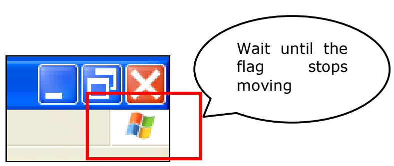
Power Failure

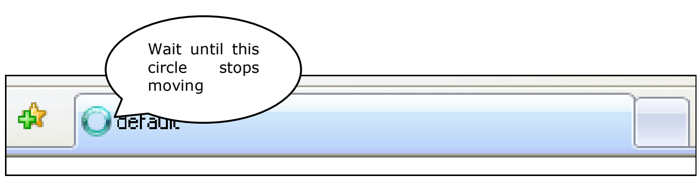
1. If a power failure occurs while a Capturer is in the process of entering information or making changes to records in the Management Information System, and he or her has not yet clicked the "Save" button, all information entered prior to the power failure will not have been written to the database.

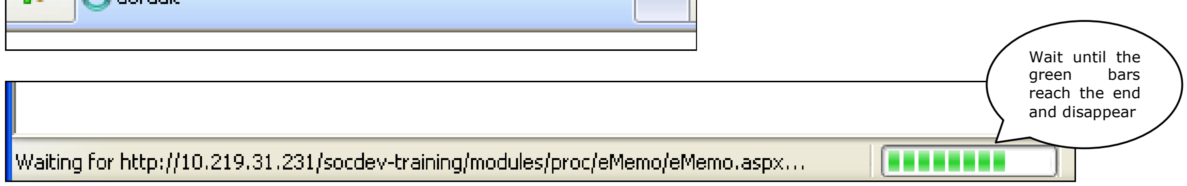
2. All information must be re-captured once the system is online again.

Tips on Capturing

1. When the system is process, be patient. Look out for the following depending on the internet version you are using.

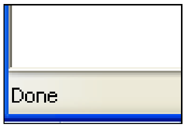




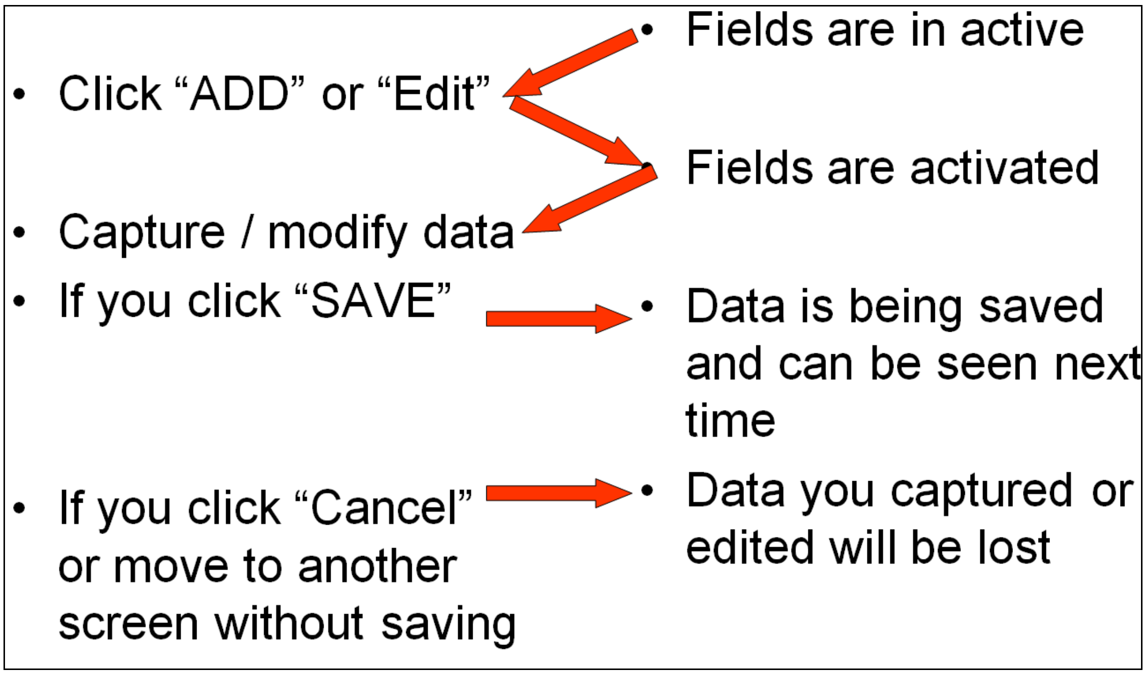


On the bottom left corner, the system will display "Done" once the process is

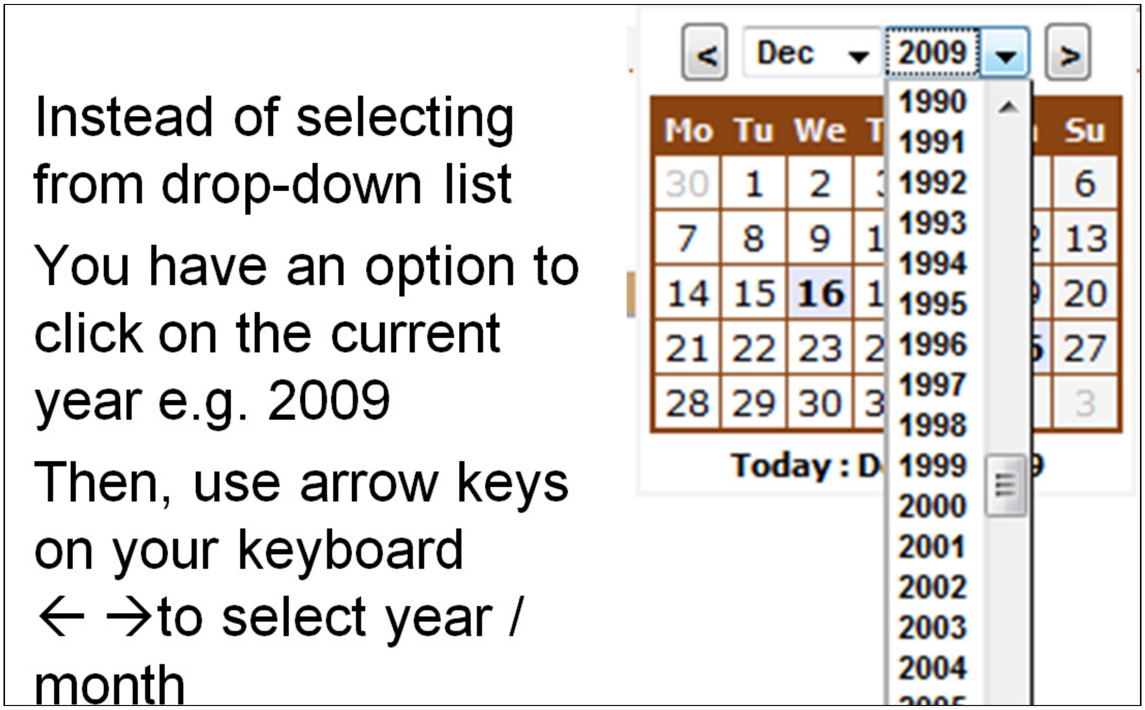
completed.



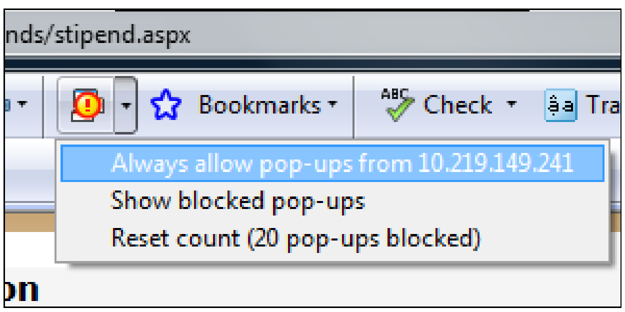
2. Indication on which button to use and when to use it.



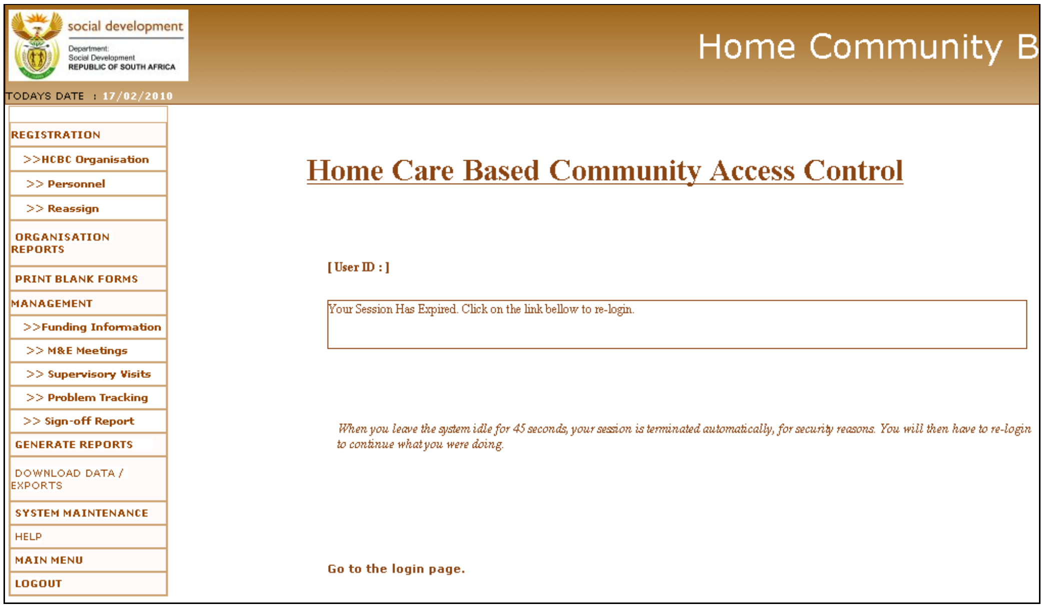
3. Quick option on capturing date.



4. When printing, look out for Pop-up blocker. Click on "**Always allow pop-up**".

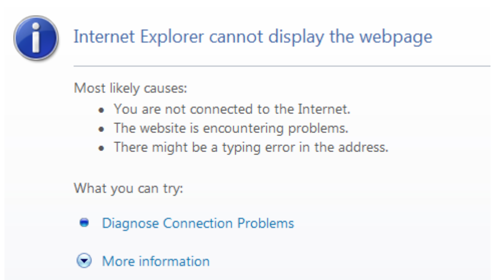


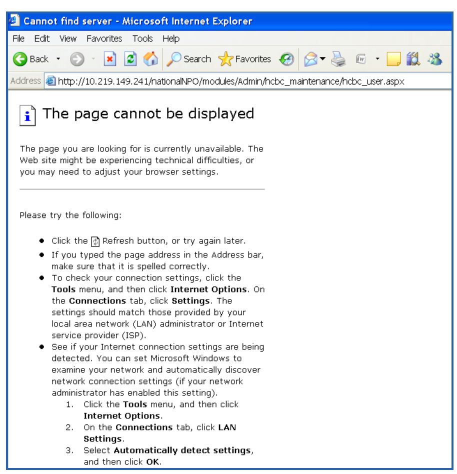
5. The session gets terminated if you don't capture anything on the system for 15 minutes. The system will display the following:



Use the back button then log out, and log in again.

6. Depending on the internet version you use, if the following is displayed the refresh the screen.





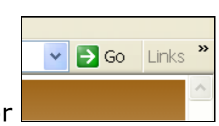
To refresh the screen press this button.  or 

Table 3 - Reference List

Community Based KPA Document (2002)	'Community Based Services'. Community Based Key Performance Area (KPA) Document. Social Development. National Government.
CorpInfo Services (2002)	'Defense in depth. A Strategy for Securing Information in Today's Networked Environment.' [Online]. Available: www.corpinfo.com/Defense_in_Depth.doc [Accessed: 14 February 2003]
Document of Monitoring and Evaluation System (SDIMS) based on performance indicators Document (2002)	'Terms of Reference' Development of Monitoring and Evaluation System based on performance indicators Document. Social Development. National Government.
Process Impact	'Software Requirements Specification'. [Online]. Available: www.processimpact.com/process_assets/srs_template.doc [Accessed: 03 February 2003]
RUSecure (2002)	'Information Security: A Managed Response'. [Online] Available: http://www.rusecure.co.uk/information_page.htm [Accessed: 14 February 2003]

Table 4 - Glossary

Attributes	The basic unit of information about an entity occurrence.
Data Flow Diagram	DFDs show the logic and flow of data through an information system in a graphical and top-down manner.
Entity	Representations of people, places and things that encapsulate the business model including rules, data and relationships.
Entity Relationship Diagram	ERD's model entities (tables) and the relationships between them.
Key Performance Indicators	Key performance indicators that can easily be tracked by coordinators at all levels.
Management Information System	Organisation, storage and retrieval of data that is accumulated and created by use of computers and computer programs.
Software Requirements Specification	The SRS document details what is to be produced and the product to be generated from the definition.

Systems Development Life Cycle	A process by which project managers, systems analysts, programmers, and end Capturers build information systems. It consists of five phases: 1. Planning **2. Analysis:** currently at this phase of development 3. Design 4. Implementation 5. Maintenance
Use Case Diagram	Describe functions of a system from a Capturers standpoint. Consists of a scenario, which describes current work situations. The scenario, which represents the view of a Capturer, comprises the system that is being developed as a black box. The inner workings of the system are hidden to the Capturer. Only the external system behaviour viewed from a concrete working context of a Capturer is of interest. In this perspective the focus is on typical interactions between Capturers and the application system